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ABSTRACT

Eighteen units on office duplication practices are presented in this teacher's guide. The unit topics include the following: classroom safety; human relations in the office setting; grooming and hygiene; telephone communications; computing routine math transactions; stencil, fluid, and offset duplication; operating business machines; indexing, alphabetizing, and filing; handling mail; and job application and interview. Each instructional unit generally contains eight components: performance objectives; an outline of minimum instructor and student activities to accomplish unit objectives; information sheets presenting basic unit content; transparency masters; job sheets which outline skills to be achieved; student assignment sheets related to the unit information sheets (answer sheets are provided); and objective tests with answer sheets. (JH)

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UNITS OF INSTRUCTION
FOR
OFFICE DUPLICATION PRACTICES

Volume I

MATERIALS DEVELOPED AND DISTRIBUTED BY

Occupational Curriculum Laboratory
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East Texas State University
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1979

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FOREWORD

The Office Duplication Practices (ODP) instructional units were developed as a result of a project funded by the Texas Education Agency to East Texas State University and the Occupational Curriculum Development Laboratory. These units were developed with the assistance of ODP instructors throughout the state of Texas and have been subjected to formal field testing and evaluation.

The enclosed materials provide instruction for skills to be acquired for entry level into various office occupations. They also provide uniformity in classroom instruction and program accountability.

Instructors' editions include objectives; suggested activities; references; information, assignment, and job sheets; tests; and answer sheets.

Student editions, which are duplicates of the instructors' materials with the exception of activity sheets, references, and answers, also are available.

The instructional materials have been reviewed by various groups to ensure educational equity and to provide a reading level appropriate for student use. However, since this program offering is available to both junior high and senior high school students, some of the instructional material may be innappropriate for a lower grade level. Care should be taken in reviewing this material prior to classroom use.

USE OF THE INSTRUCTIONAL UNITS

The ODP instructional units cover certain instructional areas in the classroom program. Each unit includes the basic components of a unit of instruction: performance objectives, suggested activities, information sheets, assignment sheets, job sheets, transparency masters, unit test, and answers to unit tests. Units are planned to cover more than one classroom period.

Careful study of each instructional unit will enable the teacher to determine:

A. The amount of material that can be covered in each class period

B. Skills that must be demonstrated

C. Supplies and equipment needed for skill performance

D. The amount of classroom time needed for teacher demonstration and student practice

E. Supplementary materials to be ordered

F. Any resource personnel who must be contacted

The specific components of an instructional unit perform the following functions:

OBJECTIVES

Each unit of instruction is based on performance objectives. These objectives specify behaviors the student will be exhibiting, thus providing students with a sense of direction.

Performance objectives are stated in two forms: Unit Objectives, which state materials to be covered in the units of instruction and how the student will handle the material; and Specific Objectives, which state the types of performance students should be displaying to satisfy the unit objective.

After the students read the objectives, classroom discussion should follow so that questions concerning expected performances can be answered.

SUGGESTED ACTIVITIES

Each unit of instruction has a suggested activities sheet outlining steps to follow in accomplishing specific objectives.

Instructor: Duties will vary from unit to unit, but the following are minimum activities:

1. Provide students with objectives, information, assignment and/or job sheets
2. Discuss objectives and information sheets
3. Make transparencies
4. Demonstrate procedures outlined on job sheets (when included)
5. Give test

Any additional instructional activities and teaching methods to aid students in accomplishing the objectives are strongly encouraged.

Student: Activities are listed to help achieve the objectives of the unit.

INFORMATION SHEET

Information sheets provide current data essential for meeting the cognitive requirements of the unit. These sheets provide an excellent guide for presenting material necessary to develop the skills specified in the unit objective.

Students should read the information sheets before the material is discussed in class. They are encouraged to make any additional notes on the information sheets to help them in their learning process.

TRANSPARENCY MASTER

Transparency masters provide information in a special way by presenting new material or reinforcing material presented in the information sheets. These are particularly effective when identification is necessary.

Transparencies made from the masters can be used as student handouts to supplement material contained in the information sheets.

JOB SHEETS

Job sheets are an integral part of each unit of instruction and the instructor should be able to demonstrate the skills outlined. Procedures specified in job sheets give direction for each skill being taught and allow both student and teacher to check student progress. Job sheets provide a ready outline to students and furnish potential employers an outline of the types of skills being taught.

ASSIGNMENT SHEET

Assignment sheets give direction to study and furnish activities which provide application of the material contained in the information sheet. These may be given to students for completion in class or for homework assignments. Answer sheets are provided for checking student progress.

UNIT TEST

Unit test questions have been constructed to measure student achievement of each specific objective listed on the objectives sheet. Individual test items may be pulled out and used as short tests to determine student achievement of a particular objective. This kind of testing may be used as a daily quiz and will help the teacher spot difficulties being encountered by students in their efforts to accomplish the unit objective.

ANSWERS TO UNIT TEST

Test answers are provided for each unit. These may be used by the teacher and/or student for checking student achievement of the objectives.

PERSONALIZING AND LOCALIZING INSTRUCTIONAL UNITS

Carefully review the instructional units before using them in the classroom. In reviewing the units, you may find it necessary to localize the units based upon the needs of your students.

Units may be supplemented through use of audio-visuals, attention-getters, field trips, resource personnel, games and simulations, case studies, peer teaching, role playing, and personal experiences of both the teacher and students.

Various methods may be used in localizing a unit of instruction. You may wish to apply units of instruction to the local community, add additional materials from newspapers and magazines, invite local resource persons, and arrange for field trips.

In personalizing a unit of instruction, you may want to make the course content relevant to home and/or work situations. You may wish to involve students in planning a unit by using their own personal experiences. Involving students in presenting some of the material is sometimes an effective example of peer teaching.

Remember that as an instructor, you may wish to add any objectives to the units of instruction based on the individual needs of the student. If this procedure is followed, you must add the corresponding information in the information sheet, add any assignment or job sheets as deemed necessary, and construct a corresponding unit test item.

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UNIT I

ORIENTATION

UNIT OBJECTIVE

After completing this unit, the student should be able to identify, list, and explain terms, definitions, and policies regarding student dress and activities, the program itself, and the Social Security program. Knowledge of this material will be evidenced through application and by satisfactorily completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, you should be able to:

1. Identify terms related to the Office Duplication Practices Program
2. Point out school and class policies
3. Identify true statements describing proper dress for the classroom
4. Point out general miscellaneous school policies
5. Explain the Social Security Program
6. Fill out an application form for a Social Security number
7. Fill out an application form for a duplicate Social Security card

UNIT I

ORIENTATION

SUGGESTED ACTIVITIES

I. Instructor:

- A. Provide objective sheet
- B. Provide information sheets and assignment sheet
- C. Discuss objectives
- D. Discuss information sheets and assignment sheet
- E. Conduct tour of classroom
- F. Invite speaker from local Social Security office
- G. Give test and evaluate results

II. Student:

- A. Read objective sheet
- B. Study information sheets
- C. Complete assignment sheets
- D. Take test

INSTRUCTIONAL MATERIALS

I. Included in this unit:

- A. Objective sheet
- B. Information sheet
- C. Transparency masters
  - 1. I-TM-1--Proper School Dress
  - 2. I-TM-2--Social Security Form
  - 3. I-TM-3--Social Security Card
- D. Assignment sheet
  - 1. Assignment Sheet #1--Application for a Social Security Number

2. Assignment Sheet # 2--Application for a Duplicate Card

E. Answers to assignment sheets

F. Unit test

G. Answers to unit test

II. References:

A. Booklet:

"Your Social Security" - available from the U.S. Department of Health, Education and Welfare

B. Books:

1. Baron, Harold and Solomon C. Steinfeld. Practical Record Keeping. Cincinnati, Ohio: South-Western Publishing Co., 1975, pp. 479-484.

2. Carson, A.B. et al. Secretarial Accounting. 9th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972, p. 78.

3. Huffman, Harry and Jeffrey R. Stewart. General Record Keeping. 7th ed. New York, N.Y.: Gregg Division, McGraw-Hill Book Company, 1976, pp. 123-127.

4. Udvari, Stephen S. Working With Others. Austin, Texas: Steck-Vaughn Company, 1973, pp. 43-47.

UNIT I

ORIENTATION

INFORMATION SHEET

I. Terms and definitions

   A. Assignment sheets--things students can do to learn material on information sheets

   B. Attitude--The way a person acts, feels, or thinks

   C. Credit--the grade, mark or score that shows a student has finished a unit or course of study

   D. Discipline--a set of rules to guide students and activities to develop proper student character

   E. FICA--Federal Insurance Contributions Act

   F. Information Sheets--a list of things a student must learn before a unit of instruction can be done

   G. Job sheet--page telling what materials, supplies, and steps are needed to learn a skill

   H. Objective sheet--tells what the student will be able to do after completing a unit of instruction

   I. Orientation--the act of learning about what is to be done

   J. Unit test--a quiz to check if the student is learning the unit of instruction

II. School and Class Policies

   A. Students attend class 2 hours each day

      1. Class and lab activities include information and practice for succeeding in the world or work

      2. Instruction will include the following subjects:

         a. Classroom safety

         b. Human relations

        c. Filing

        d. Handling mail

        e. Copying machines

        f. Duplicating machines

B. Students must follow all school rules

   1. These rules and any other instructions can be given by a teacher, principal, or other school official

   2. Following these rules gives order and purpose to the school program

C. Students should know the school rules for the following:

   1. Grades

   2. How many weeks a report card includes

   3. Excused and unexcused absences

   4. Class changes

   5. Long illnesses and doctor's letters

   6. Making up school work missed when absent

   7. Class attendance, hall passes, and being tardy

   8. Student suspension

III. Student Dress Policy

   1. Extreme styles in relation to clothes, hair length, and jewelry should be avoided

   2. Shirts should be tucked into the trousers except for shirts with straight-cut tails

   3. If shirt is worn inside trousers or skirt, a belt must be worn

   4. Socks or hose must be worn at all times

   5. Dress should be decent and appropriate for school

   6. Thin or "see-through" garments must be worn with undergarments

    7. Blue jeans should be clean
    8. A belt must be worn if slacks are designed to be worn with one

IV. Other school policies

- A. Smoking on the part of students is usually not permitted in any school buildings or on the school campus. Check local school policy
- B. Students are to park their cars in an area for student parking
- C. Running in the school halls or stairways is not permitted under any circumstances
- D. Destroying or defacing school property can result in the student being suspended or possibly expelled from school

V. Social Security

- A. History and purpose
  1. Government-sponsored program
  2. Administered by the Bureau of Old Age and Survivor's Insurance
  3. Set up so that employees can be helped from the program
  4. Employer and employee both put money into the program
  5. Numbers (e.g., S.S. 494-57-9999) are issued to persons to identify them
- B. Social Security application forms (TM-2)
  1. Are given at nearest office of the Social Security Administration
  2. If there is no local office, forms can be found at the nearest post office
  3. When applying for membership, a person must have a birth certificate or other proof of identity or age
- C. Social Security card (TM-3)
  1. A Social Security number will be sent soon after a person applies

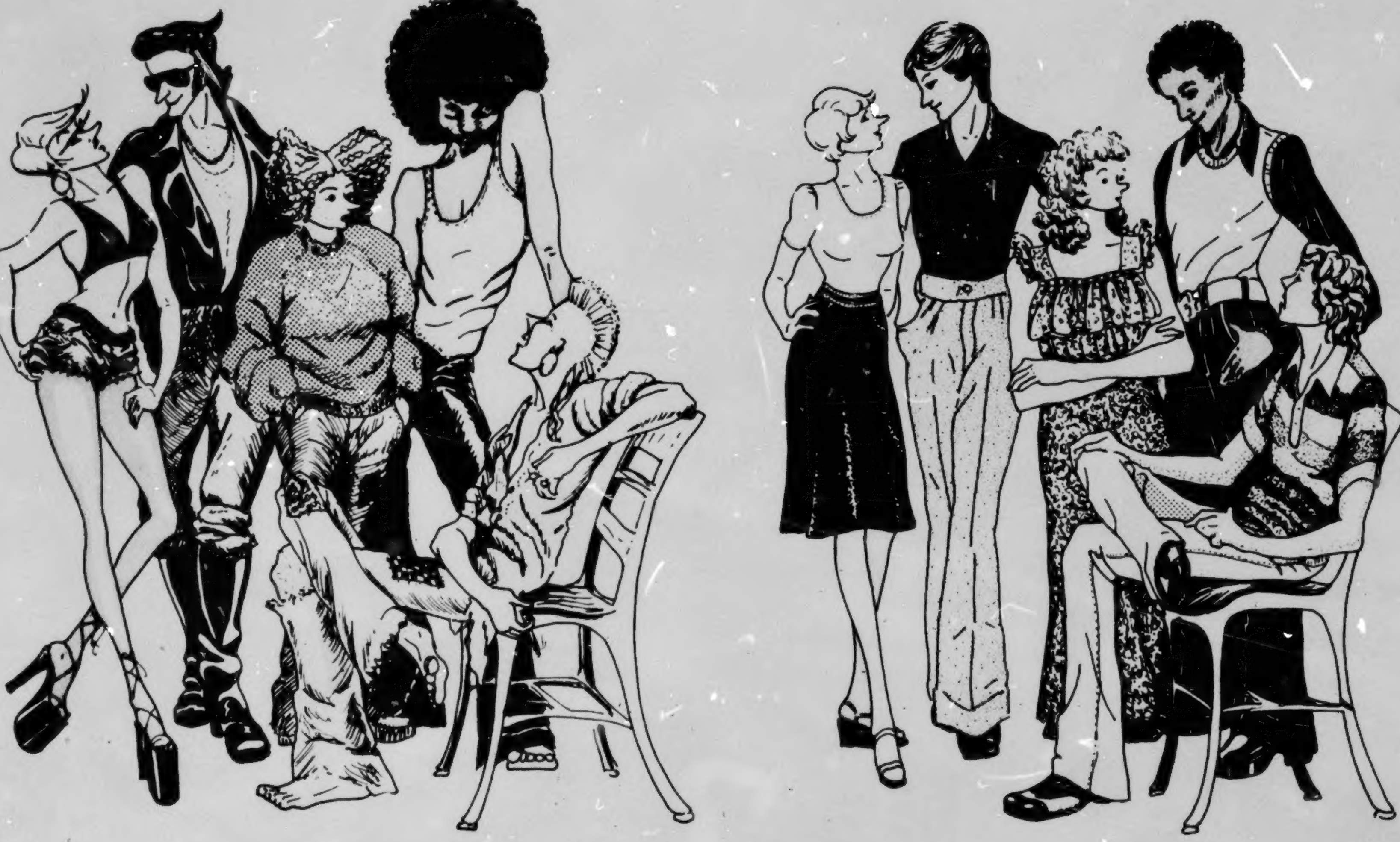
2. The card shows a number which is used to record an employee's earnings, tax payments, and benefits

    a. The number also is used as identification on income tax returns, bank records, military service records, etc.

    b. Colleges and businesses sometimes use the number to identify persons

3. If the card is lost, a person must fill in and return an application form asking for a duplicate card, not a new number

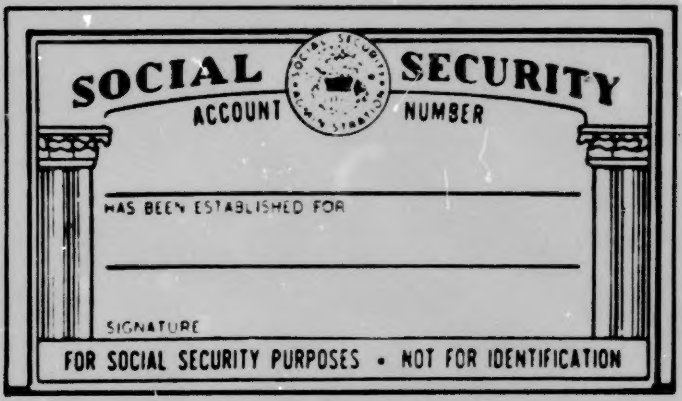
AVOID "FAR OUT" STYLES



TM-5

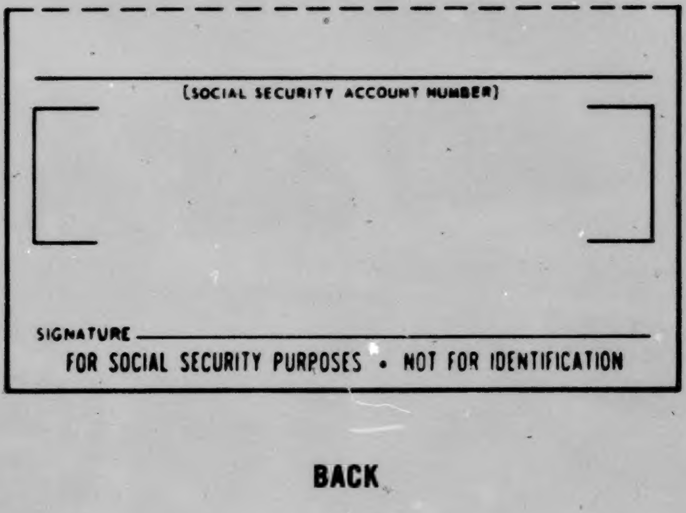
I-9

SOCIAL SECURITY CARD



SOCIAL SECURITY
ACCOUNT NUMBER
HAS BEEN ESTABLISHED FOR
SIGNATURE
FOR SOCIAL SECURITY PURPOSES • NOT FOR IDENTIFICATION

FRONT



(SOCIAL SECURITY ACCOUNT NUMBER)
SIGNATURE
FOR SOCIAL SECURITY PURPOSES • NOT FOR IDENTIFICATION

BACK

APPLICATION FOR SOCIAL SECURITY NUMBER

ID
CN
DO 845

APPLICATION FOR A SOCIAL SECURITY NUMBER

DO NOT WRITE IN THE ABOVE SPACE

See Instructions on Back.
Print in Black or Dark Blue Ink or Use Typewriter.

1 Print FULL NAME YOU WILL USE IN WORK OR BUSINESS (First Name) (Middle Name or Initial – if none, draw line __) (Last Name)

2 Print FULL NAME GIVEN YOU AT BIRTH

3 PLACE OF BIRTH (City) (County if known) (State)

4 MOTHER'S FULL NAME AT HER BIRTH (Her maiden name)

5 FATHER'S FULL NAME (Regardless of whether living or dead)

6 YOUR DATE OF BIRTH (Month) (Day) (Year)

7 YOUR PRESENT AGE (Age on last birthday)

8 YOUR SEX MALE ☐ FEMALE ☐

9 YOUR COLOR OR RACE WHITE ☐ NEGRO ☐ OTHER ☐

10 HAVE YOU EVER BEFORE APPLIED FOR OR HAD A UNITED STATES SOCIAL SECURITY, RAILROAD, OR TAX ACCOUNT NUMBER? NO ☐ DON'T KNOW ☐ YES ☐ (If "YES" Print STATE in which you applied and DATE you applied and SOCIAL SECURITY NUMBER if known)

11 YOUR MAILING ADDRESS (Number and Street, Apt. No., P O Box, or Rural Route) (City) (State) (Zip Code)

12 TODAY'S DATE

13 TELEPHONE NUMBER

14 NOTICE: Whoever, with intent to falsify his or someone else's true identity, willfully furnishes or causes to be furnished false information in applying for a social security number, is subject to a fine of not more than $1,000 or imprisonment for up to 1 year, or both.

Sign YOUR NAME HERE (Do Not Print)

TREASURY DEPARTMENT Internal Revenue Service
Form SS-5 (2-74)

☐ RESCREEN ☐ ASSIGN ☐ DUP ISSUED

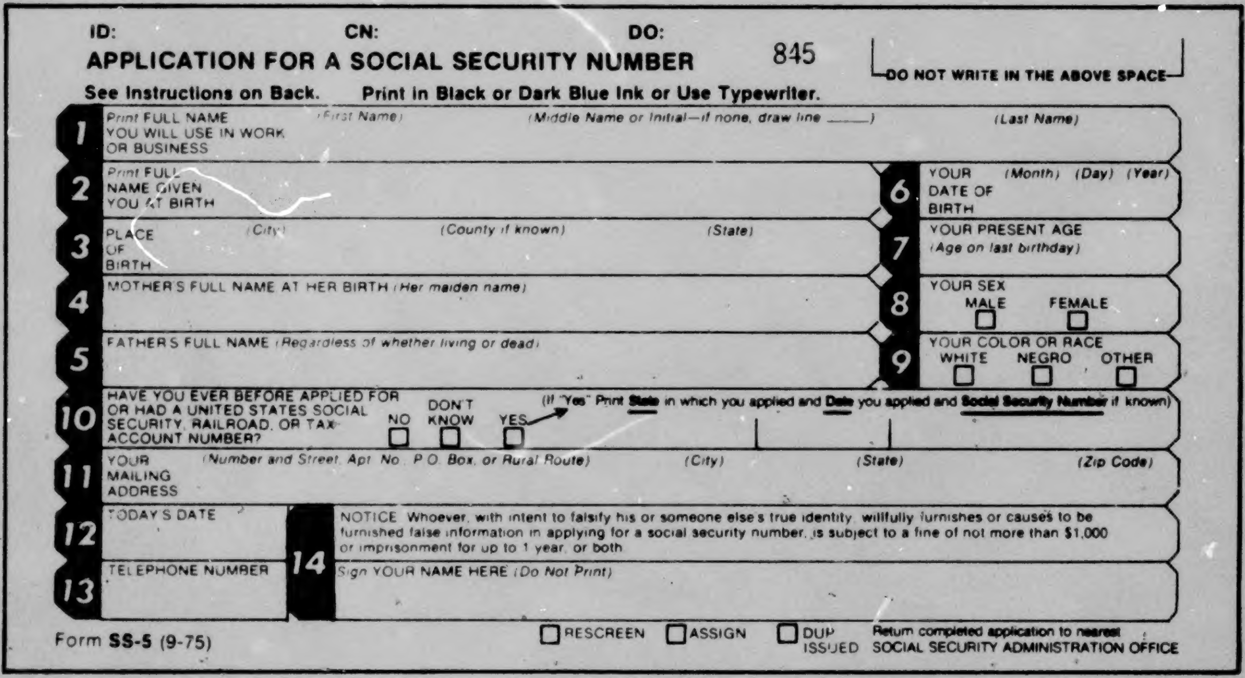
Return completed application to nearest
SOCIAL SECURITY ADMINISTRATION OFFICE

UNIT I

ORIENTATION

ASSIGNMENT SHEET #1--APPLICATION FOR SOCIAL SECURITY NUMBER

Directions: Using a dark blue or black ink pen, complete the application form by using your own information



ID: CN: DO:

APPLICATION FOR A SOCIAL SECURITY NUMBER 845

DO NOT WRITE IN THE ABOVE SPACE

See Instructions on Back. **Print in Black or Dark Blue Ink or Use Typewriter.**

1 Print FULL NAME YOU WILL USE IN WORK OR BUSINESS (First Name) (Middle Name or Initial—if none, draw line ____) (Last Name)

2 Print FULL NAME GIVEN YOU AT BIRTH

6 YOUR DATE OF BIRTH (Month) (Day) (Year)

3 PLACE OF BIRTH (City) (County if known) (State)

7 YOUR PRESENT AGE (Age on last birthday)

4 MOTHER'S FULL NAME AT HER BIRTH (Her maiden name)

8 YOUR SEX MALE ☐ FEMALE ☐

5 FATHER'S FULL NAME (Regardless of whether living or dead)

9 YOUR COLOR OR RACE WHITE ☐ NEGRO ☐ OTHER ☐

10 HAVE YOU EVER BEFORE APPLIED FOR OR HAD A UNITED STATES SOCIAL SECURITY, RAILROAD, OR TAX ACCOUNT NUMBER? NO ☐ DON'T KNOW ☐ YES ☐ → (If "Yes" Print **State** in which you applied and **Date** you applied and **Social Security Number** if known)

11 YOUR MAILING ADDRESS (Number and Street, Apt. No., P.O. Box, or Rural Route) (City) (State) (Zip Code)

12 TODAY'S DATE

13 TELEPHONE NUMBER

14 NOTICE: Whoever, with intent to falsify his or someone else's true identity, willfully furnishes or causes to be furnished false information in applying for a social security number, is subject to a fine of not more than $1,000 or imprisonment for up to 1 year, or both.

Sign YOUR NAME HERE (Do Not Print)

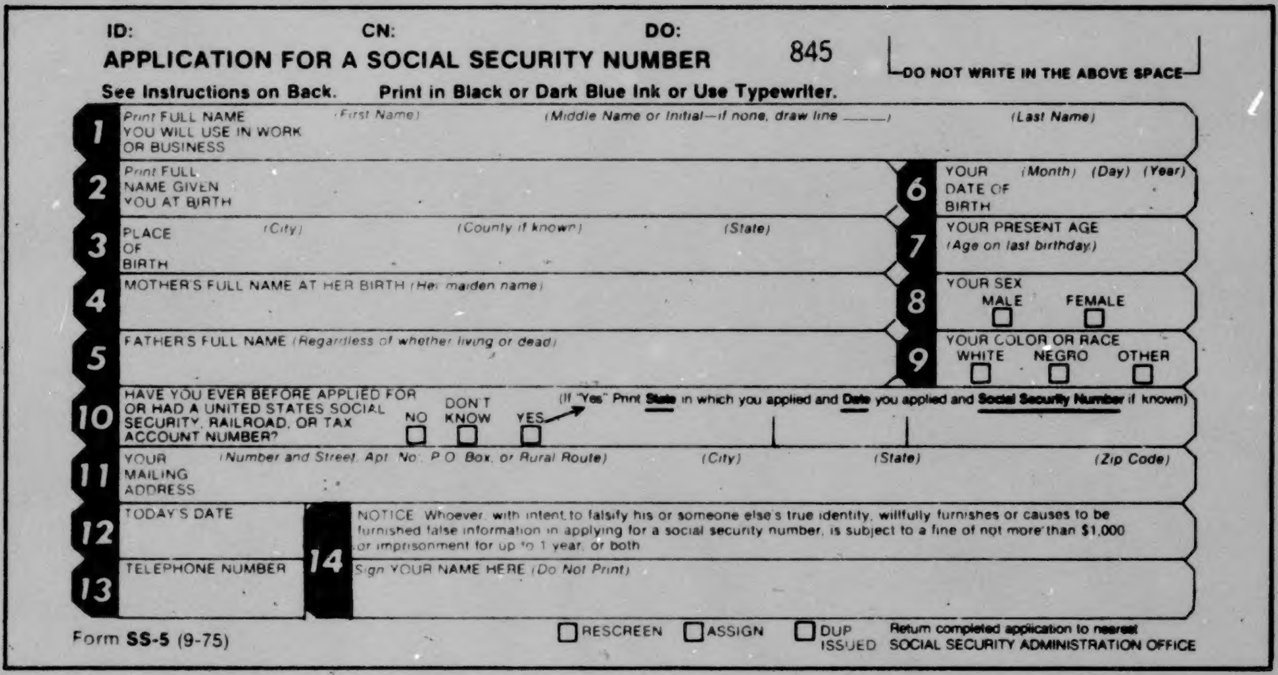
Form **SS-5** (9-75) ☐ RESCREEN ☐ ASSIGN ☐ DUP ISSUED Return completed application to nearest SOCIAL SECURITY ADMINISTRATION OFFICE

UNIT I

ORIENTATION

ASSIGNMENT SHEET #2--APPLICATION FOR A DUPLICATE CARD

Directions: Using a dark blue or black ink pen, complete the following form to ask for a duplicate card



ID: **CN:** **DO:**

APPLICATION FOR A SOCIAL SECURITY NUMBER 845

DO NOT WRITE IN THE ABOVE SPACE

See Instructions on Back. **Print in Black or Dark Blue Ink or Use Typewriter.**

1 *Print* FULL NAME YOU WILL USE IN WORK OR BUSINESS *(First Name)* *(Middle Name or Initial—if none, draw line ____)* *(Last Name)*

2 *Print* FULL NAME GIVEN YOU AT BIRTH

6 YOUR DATE OF BIRTH *(Month)* *(Day)* *(Year)*

3 PLACE OF BIRTH *(City)* *(County if known)* *(State)*

7 YOUR PRESENT AGE *(Age on last birthday)*

4 MOTHER'S FULL NAME AT HER BIRTH *(Her maiden name)*

8 YOUR SEX MALE ☐ FEMALE ☐

5 FATHER'S FULL NAME *(Regardless of whether living or dead)*

9 YOUR COLOR OR RACE WHITE ☐ NEGRO ☐ OTHER ☐

10 HAVE YOU EVER BEFORE APPLIED FOR OR HAD A UNITED STATES SOCIAL SECURITY, RAILROAD, OR TAX ACCOUNT NUMBER? NO ☐ DON'T KNOW ☐ YES ☐ (If "Yes" Print **State** in which you applied and **Date** you applied and **Social Security Number** if known)

11 YOUR MAILING ADDRESS *(Number and Street, Apt. No., P.O. Box, or Rural Route)* *(City)* *(State)* *(Zip Code)*

12 TODAY'S DATE

14 NOTICE: Whoever, with intent to falsify his or someone else's true identity, willfully furnishes or causes to be furnished false information in applying for a social security number, is subject to a fine of not more than $1,000 or imprisonment for up to 1 year, or both

13 TELEPHONE NUMBER

Sign YOUR NAME HERE *(Do Not Print)*

Form **SS-5** (9-75) ☐ RESCREEN ☐ ASSIGN ☐ DUP ISSUED Return completed application to nearest SOCIAL SECURITY ADMINISTRATION OFFICE

UNIT I

ORIENTATION

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

The completed form should be neatly printed and provide the following types of information:

Assignment Sheet #2

The completed form for requesting a duplicate card should be similar to the following:

UNIT I

ORIENTATION

UNIT TEST

1. Match each of the following terms with its correct definition.

_____a. Information sheet

_____b. Objective sheet

_____c. FICA

_____d. Orientation

_____e. Attitude

_____f. Unit test

_____g. Job sheet

_____h. Assignment sheet

_____i. Discipline

_____j. Credit

1. The act of learning about what is to be done
2. The way a person acts, feels, or thinks
3. The grade, mark, or score that shows a student has finished a unit or course of study
4. A set of rules to guide students and activities to develop good student character
5. Federal Insurance Contribution Act
6. Tells what the student will be able to do after completing a unit of instruction
7. A list of things a student completes in a unit of instruction
8. Things students can do to learn material on information sheet
9. Page telling what materials, supplies, and steps are needed to learn a skill
10. A quiz to check if student is understanding information in the unit of instruction

2. Point out school and class policies by

   a. Listing some of the subjects in the ODP program.

   b. Placing TRUE next to those statements that are true.

      _____ (1) School rules and instructions can be given only by the principal

      _____ (2) Following instructions and rules is good for the program and the school

   c. Placing a "√" beside those school policy areas that students should know.

      _____ (1) grades

      _____ (2) class changes

      _____ (3) school budgets

      _____ (4) "make up" policy

      _____ (5) student suspension

      _____ (6) report card time periods

      _____ (7) teacher salaries

3. Place a "√" next to those statements that describe proper dress for the classroom.

   _____ a. Shirts not tucked into the trousers or a skirt

   _____ b. Wearing sandals without socks or hose

   _____ c. Wearing blue jeans without a belt even though the jeans have belt loops

   _____ d. Wearing shirts with straight cut tails on the outside

   _____ e. Wearing "see-through" clothes without undergarments

4. Place TRUE beside correct statements on other school policies.

_____ a. Smoking is permitted in the school except in the cafeteria

_____ b. Students are to park their cars in an area for student parking

_____ c. Chewing gum is permitted as long as the student does not "pop" the gum

_____ d. Running in the school halls is not permitted

_____ e. Destroying school property can result in a $.25 charge to the student

5. Explain the Social Security program by underlining the correct word(s) in each of the following sentences.

   a. The (union, government) sponsors Social Security.

   b. It is supervised by the Bureau of (Old Age and Survivor's Insurance, Welfare).

   c. (Employers, Employees) can benefit from the program.

   d. (Employers, Employees) contribute money to the program.

   e. For identification, (numbers, letters) are issued.

   f. Application forms can be obtained at the nearest (police station, post office).

   g. A Social Security card is sent to the individual in (a short period of time, six months).

   h. The number on the Social Security card is used for (identification, taxes).

   i. If the Social Security card is lost, a form is filled out for a (new number, duplicate card).

6. Fill out an application for a Social Security number.

7. Fill out an application for a duplicate card.

(NOTE: If activities #6 & #7 have not been completed prior to the test, ask the instructor when they should be completed.)

UNIT I

ORIENTATION

ANSWERS TO UNIT TEST

1. 8 a.
7 b.
6 c.
2 d.
1 e.
3 f.
11 g.
10 h.
9 i.
5 j.
4 k.

2. a. The list should include

Classroom safety, human relations, filing, handling mail, copying machine, duplicating machines

b. ____ (1)
TRUE (2)

c. ✓ (1)
✓ (2)
____ (3)
✓ (4)
✓ (5)
✓ (6)
____ (7)

3. ____ a.
✓ b.
____ c.
✓ d.
____ e.

4. ______ a.

   TRUE b.

   ______ c.

   TRUE d.

   ______ e.

5. a. government

   b. Old Age and Survivor's Insurance

   c. Employers

   d. Employers, Employees

   e. number

   f. post office

   g. a short period of time

   h. identification

   i. duplicate card

6. Evaluated to the satisfaction of the instructor

7. Evaluated to the satisfaction of the instructor

UNIT II

CLASSROOM SAFETY

UNIT OBJECTIVE

After completing this unit, the student should be able to recognize safety rules and practices, and to assist in establishing and maintaining a schedule of classroom cleanup activities. Knowledge of this material will be evidenced through demonstration and by satisfactorily completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student should be able to:

1. Match safety terms with their correct definitions.
2. Identify the scope of general safety.
3. Explain aspects of a proper safety attitude.
4. Describe personal safety.
5. Explain the difference between group and personal safety.
6. Identify safety rules for the ODP classroom.
7. Recognize procedures in caring for equipment in the ODP classroom.
8. Select activities to be included in a Friday afternoon cleanup schedule.
9. Construct a poster on classroom safety.
10. Write a paragraph on a classroom safety practice.
11. Develop a Friday afternoon cleanup schedule.

UNIT II

CLASSROOM SAFETY

SUGGESTED ACTIVITIES

I. Instructor:

  A. Provide student with objective sheet.

  B. Provide student with information and assignment sheets.

  C. Discuss terminal and specific objectives.

  D. Discuss information sheet.

  E. Make and show transparencies.

  F. Give test and evaluate results.

II. Student:

  A. Read objective sheet.

  B. Study and discuss information sheet.

  C. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Transparency masters

    1. II-TM-1--Horseplay in the Shop

    2. II-TM-2--Recognizing Unsafe Conditions

    3. II-TM-3--Proper Ventilation

    4. II-TM-4--Removing Unsafe Jewelry and Clothes

    5. II-TM-5--Flammable Liquids

    6. II-TM-6--Labels

7. II-TM-7--Lifting Boxes

D. Assignment sheets

1. Assignment Sheet #1--Application of Safety Rules

2. Assignment Sheet #2--Setting up Friday Afternoon Work Activities

E. Test

F. Answers to test

II. References:

A. Kigen, Denis J. Teacher Liability in School - Shop Accidents. Ann Arbor, Michigan: Prakken Publications, Inc., 1973.

B. Shop Safety. Elmore, Alabama: Rehabilitation Research Foundation, 1966.

C. Thomas, John C. Safety in Trade & Industrial and Technical Education. Lexington, Ky: Curriculum Development Center, University of Kentucky, 1974.

III. Additional References:

A. 16 mm Films

1. "Extinguish That Fire," Los Angeles Fire Department

2. "First Aid"--Available from nearest Education Service Center or local chapter of American Red Cross

3. "Human Factors in Safety"-- National Safety Council, 435 N. Michigan Ave., Chicago, Illinois, 60611.

4. "Office Safety"-- Available from nearest Education Service Center

5. "Safety"-- Series of films from Bell Telephone Company

6. "Safety"-- Series of films from Texas State Department of Health, Austin, Texas, 78701

7. "Shock"-- Available from nearest Education Service Center

8. "They Called It Fireproof"-- Available from Texas State Department of Health, Austin, Texas, 78701

B. Transparencies-- "Safety"--Series of transparencies, 3M Company, St. Paul, Minnesota, 55101.

UNIT II

SAFETY

INFORMATION SHEET

I. Terms and definitions

   A. Injury--The hurt of an individual as a result of an accident

   B. Accident--An unplanned event which could cause and injury

   C. Unsafe act--Something that is not normal ncr safe

   D. Unsafe condition--A situation that could lead to an accident

   E. OSHA--Occupational Safety and Health Administration

II. Safety

   A. Means free from accidents

   B. Includes general rules that combine:

      1. Attitudes

      2. Personal safety

      3. Group safety

      4. Use of equipment and supplies

III. Safety attitude

   A. A proper attitude is a must in an Office Duplication Practices classroom.

   B. Most accidents are caused by being careless.

   C. Each student must be on guard against accidents at all times.

   D. Talking and "carrying on" with your friends in the classroom should be avoided.

      1. These keep the student from being completely alert around office machines.

2. These make the student more accident-prone.

IV. Personal Safety

A. Involves protecting yourself from injury caused by your own or other's actions.

B. Also involves knowing what unsafe conditions are.

C. By being safe, you protect yourself as well as others.

V. Group Safety

A. Includes the entire class.

B. Any student behavior or conduct can be a reaction on your part.

C. Classroom safety should be stressed to all classroom friends.

VI. Safety Rules For The Office Duplication Classroom

A. Cords should be unplugged and wrapped around the machines to which they are attached if they are causing a safety hazard. For example, cords should not be left in walk-ways because people can trip on them.

B. To connect or disconnect a machine, hold the plug instead of the wire. If you pull on the wire, you could get shocked if the wire and plug separate.

C. Always look down at the floor if you are walking in an area where plugs are exposed, or where wires must cross walk-ways during class. If is important to look up and down and walk carefully when in a room with some safety hazards.

D. Keep the floor clean from paper or spills, or anything that might cause a person to slip.

E. Tell the teacher about unusual conditions. This may keep the classroom from becoming unsafe.

F. Keep all filing drawers or desk drawers closed when not in use. A person who is not looking ahead could trip over a drawer.

G. Always use materials and supplies for their real purpose. Machines can be destroyed by improperly used materials and supplies.

H. Ask the teacher for more instruction when you are not sure how to do something.

I. Dress with care when attending Office Duplication Class. Jewelry, ties, scarves, and certain other types of clothing can be dangerous if worn when you operate machines.

J. Keep your mind on your work while in the classroom. "Horseplay" can cause you or others injury.

K. Always unplug a machine if something goes wrong. Tell the teacher before you try to make even minor adjustments.

L. Be sure to talk clearly when giving directions so the other person knows what you mean.

M. Check to be sure that no other persons have their hands on a machine when you plan to start the machine.

N. Be sure that the machine is turned to the OFF position when not being used.

O. Have good air flow when using fluids and inks on machines.

P. In case of a paper jam, immediately turn the machine to the OFF position. Tell the teacher.

Q. Tie long hair back away from the face and shoulders when operating machinery.

R. Be sure to wipe up any spills immediately, so no one will slip on them.

VII. Care of Equipment

A. Care of equipment starts by caring for the area around it.

1. The work area must be kept clean and neat.

2. There should be enough space in the work area for correct machine operation.

3. No articles, furniture, or supplies should block the operation of machine parts.

B. Students should not try to repair office equipment. When a piece of equipment is not operating properly:

   1. Pull the plug.

   2. Call the instructor, who will call a mechanic if necessary, to inspect the equipment and make necessary repairs.

C. Care must be used in plugging and unplugging electrical equipment. Hold the electrical plug rather than the cord to unplug machines.

   1. Electrical cords should be checked to see if they are frayed, tangled, or damaged.

   2. Electrical outlets must not be overloaded.

   3. Any electrical equipment not being used should be unplugged.

D. Students are responsible for cleaning up any equipment they use, whether it be an offset press or an electric typewriter.

VIII. Friday Afternoon Work Activity for Office Duplication Practices

A. Keep in mind that your machine is just as good to you as you are to your machine.

B. For easy and trouble-free operation of machines in the ODP classroom or anywhere else:

   1. Keep all machines clean.

   2. Clean the outside and the cylinder of the spirit duplicator with spirit fluid.

   3. Keep small bits of paper cleared from the drill bit of the paper drill.

   4. Use a glaze remover to clean rollers of the paper folder. Clean the exterior with hand cleaner.

   5. Keep the collator trays dusted. Clean the rollers with glaze remover.

   6. Clean the offset at least once a week.

   a. Clean the outside areas of the offset work counter and rollers.

   b. Use chrome cylinder cleaner to clean the master and impression cylinders.

   c. Use glaze remover on the blanket to extend the life of the blanket.

7. Use a commercial typewriter cleaner to clean the platen and plastic shield.

8. Most typewriter companies provide a brush to clean the typing element or keys. Use it!

9. Be sure that the typewriter is turned OFF before leaving the classroom.

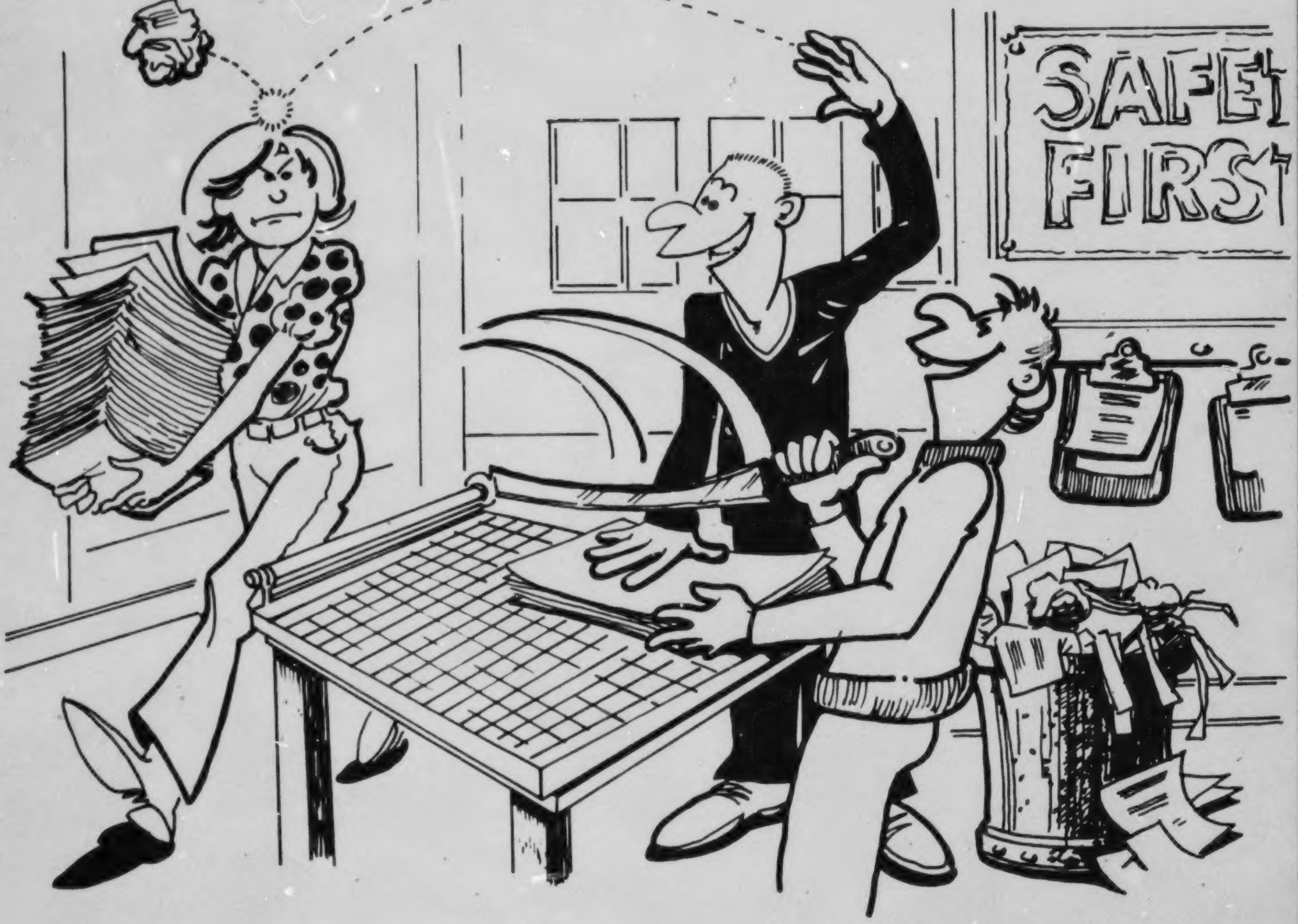
10. Cover the typewriter at the end of the day

11. Wipe the glass on any machine, such as the headliner machine, with glass cleaner to remove smudges and fingerprints.

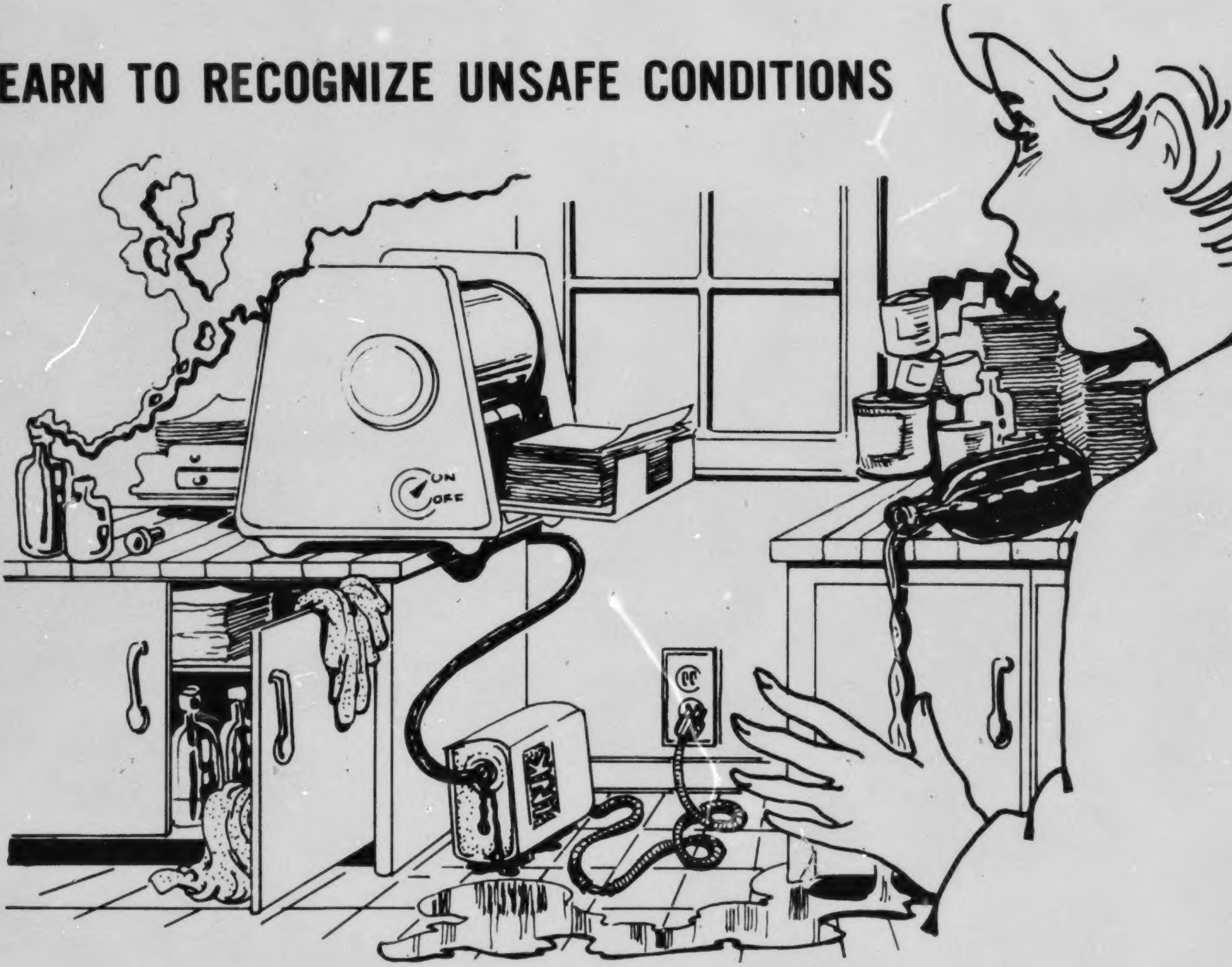
12. Check the padding table and scrape up any spilled padding compound.

13. Turn the mimeograph machine to ON if it has not been recently in use. Let it run for 5-10 minutes to avoid ink separation.

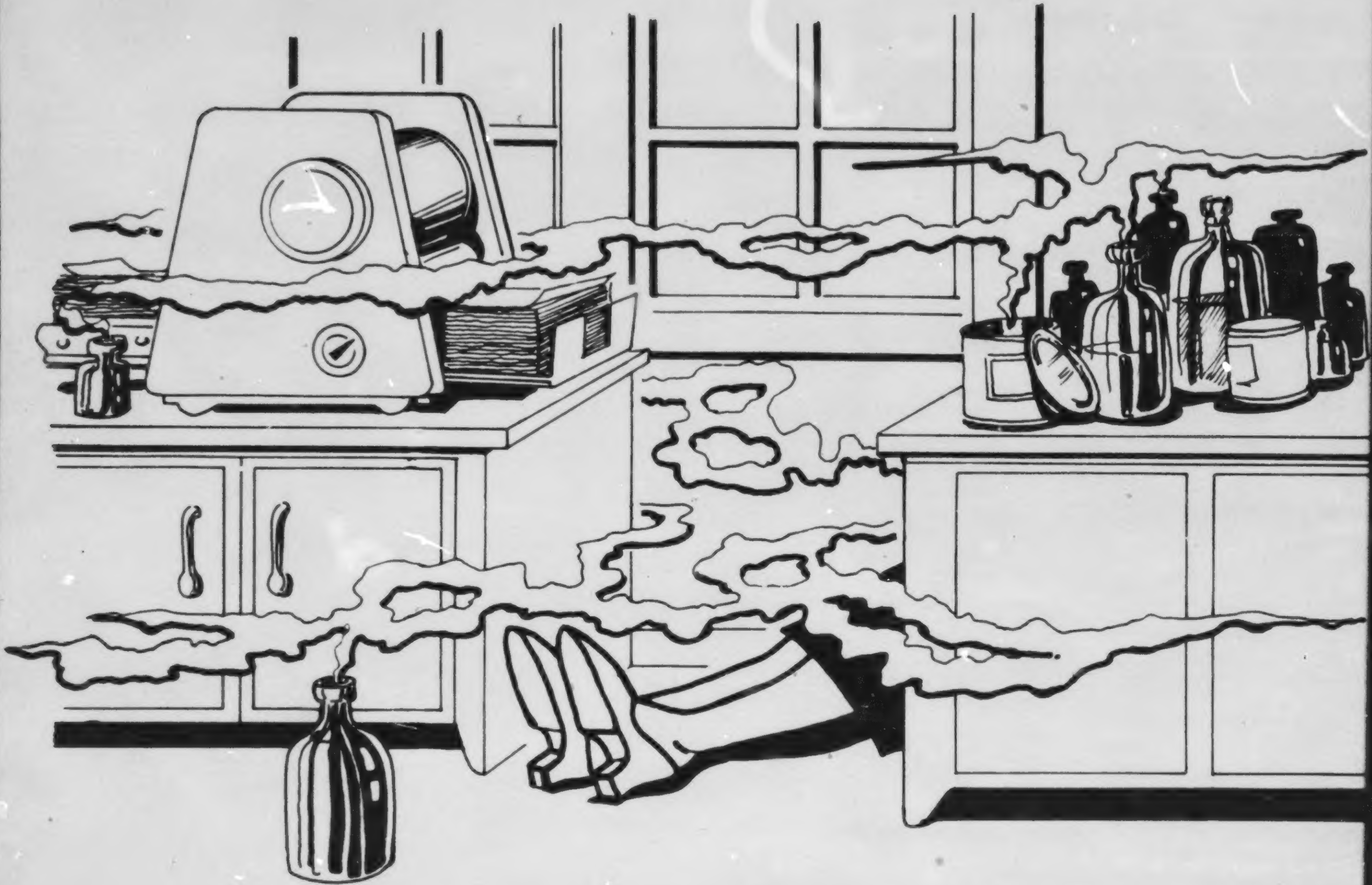
AVOID HORSEPLAY



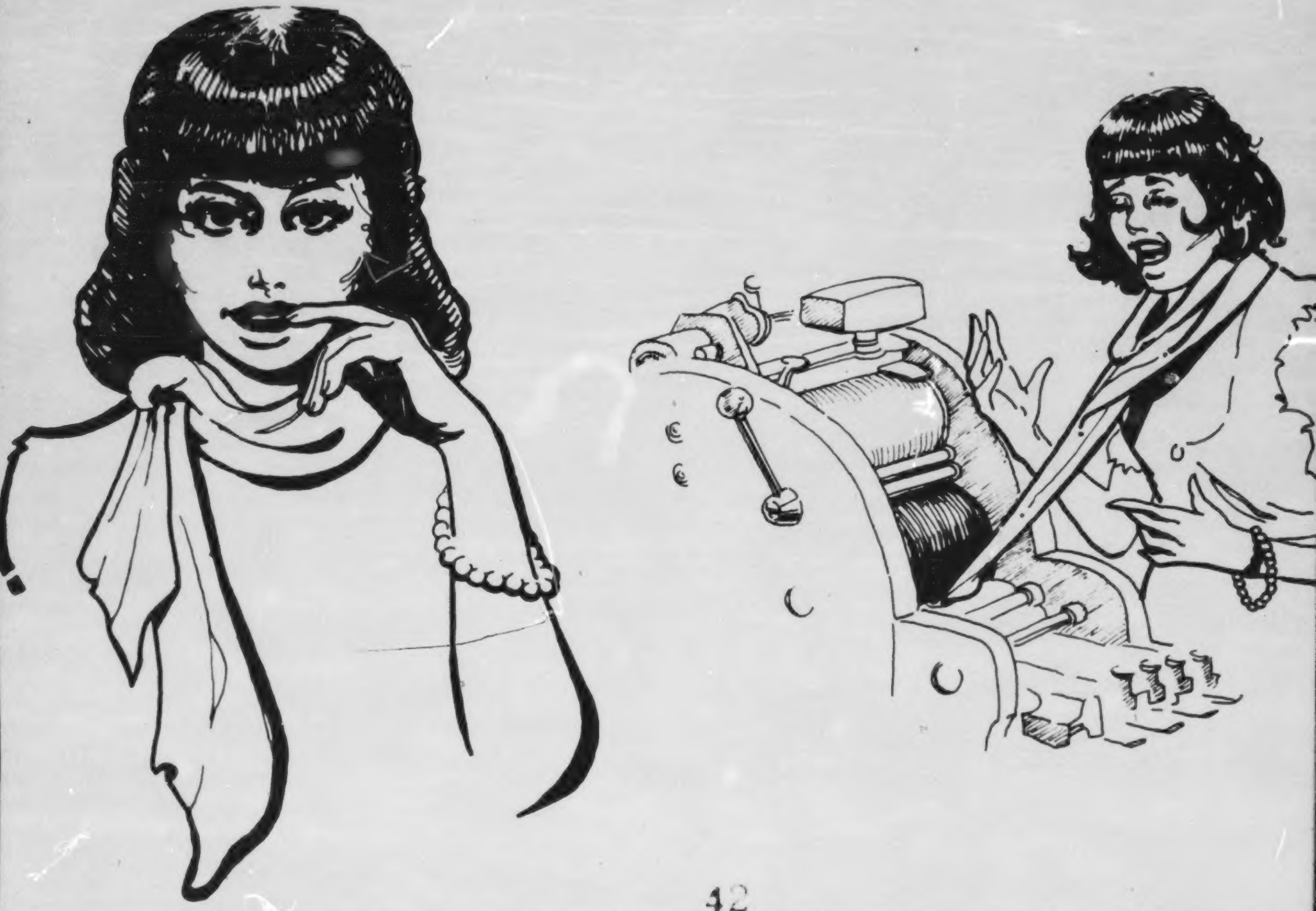
LEARN TO RECOGNIZE UNSAFE CONDITIONS



BE SURE YOU HAVE PROPER VENTILATION



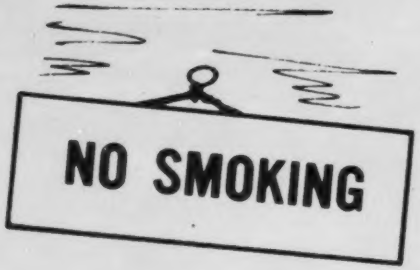
REMEMBER TO REMOVE UNSAFE JEWELRY AND WEARING APPAREL



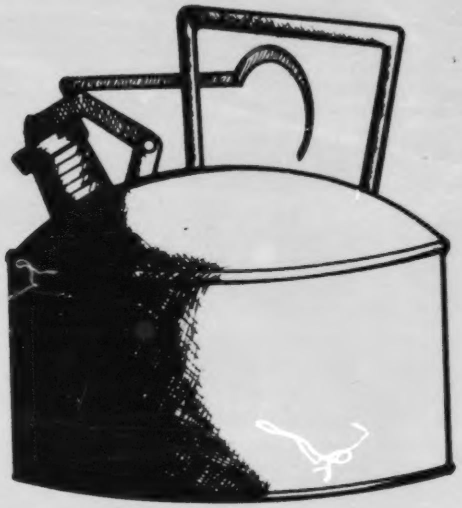
FLAMMABLE LIQUIDS

"BEFORE KINGDOM COMES – DO A JOB WELL DONE"

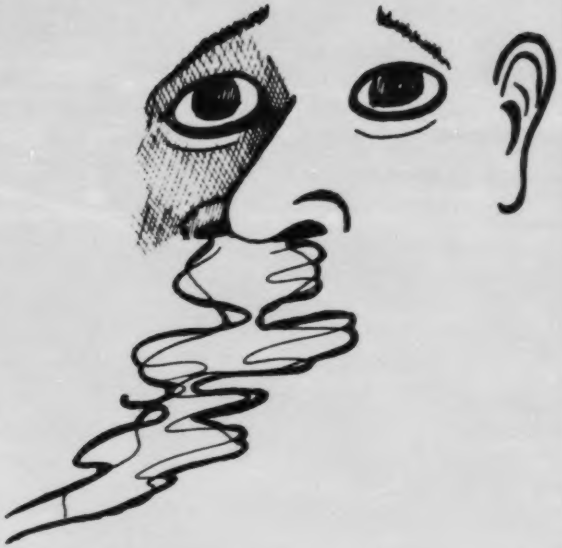
USE FLAMMABLE LIQUIDS SAFELY



POST "NO SMOKING" SIGNS

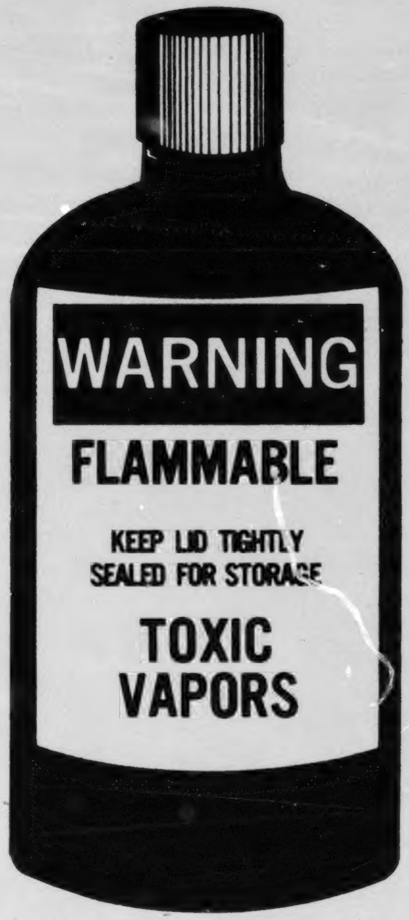


KEEP FLAMMABLE LIQUIDS IN
APPROVED CONTAINERS ONLY

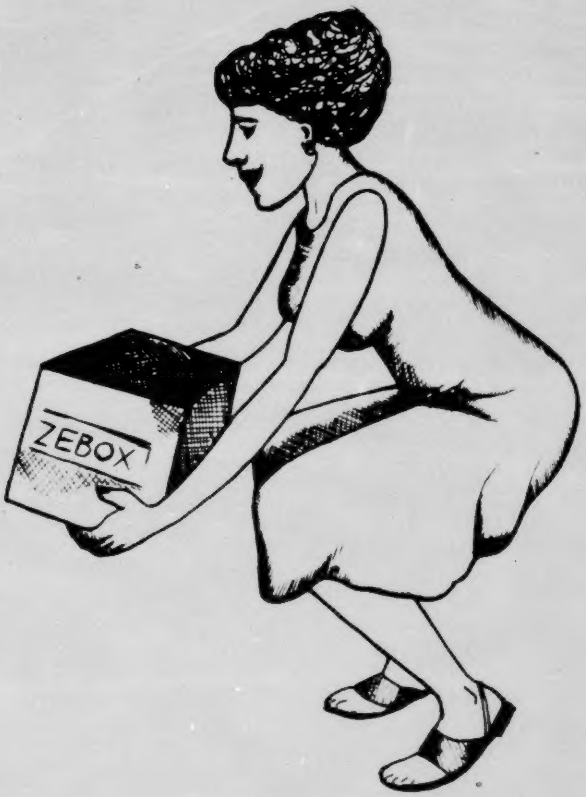


REMEMBER - FLAMMABLE LIQUIDS
GIVE OFF FLAMMABLE OR TOXIC VAPORS

READ AND HEED ALL LABELS--
THEY WILL WARN YOU, NOT HARM YOU


WARNING
FLAMMABLE
KEEP LID TIGHTLY
SEALED FOR STORAGE
TOXIC
VAPORS

LEG POWER FOR LIFTING - NOT BACK POWER



UNIT II

CLASSROOM SAFETY

ASSIGNMENT SHEET #1--APPLICATION OF SAFETY RULES

Directions:

1. Select 1 of the 18 rules for the Office Duplication Practices classroom, listed on the information sheet, and make a poster. The poster should tell about a situation outlined on the information sheet.

2. Select 5 of the safety rules listed on the information sheet and write a short paragraph on the importance of observing each rule. Base your paragraph on any discussions held in class and add any ideas you may have. Each paragraph should have at least 5 sentences.

UNIT II

CLASSROOM SAFETY

ASSIGNMENT SHEET #2--SETTING UP FRIDAY AFTERNOON WORK ACTIVITIES

Directions: Using the list of activities included on the information sheet, set up a Friday afternoon cleanup schedule. Include any other activities not listed on the information sheet that should be a part of the schedule. Make a chart showing the activities and the students who will be acting as the cleanup "crew."

UNIT II

CLASSROOM SAFETY

ANSWERS TO ASSIGNMENT SHEETS

ASSIGNMENT SHEETS #1 & #2

Evaluated to the satisfaction of the instructor

UNIT II

CLASSROOM SAFETY

UNIT TEST

1. Match the terms on the left with their correct definition by placing the number in the space next to the term.

____a. Accident

____b. Injury

____c. Unsafe act

____d. Unsafe condition

____e. OSHA

1. Hurt of an individual as a result of an accident

2. A situation that may lead to an accident

3. An unplanned event that may lead to an injury

4. Occupational Safety and Health Administration

5. A procedure not normal or safe

6. Overseas Safety and Housing Act

7. Hurt of an individual as a result of a long illness

2. Place a "✓" beside the terms that are used with general safety:

____a. Attitudes

____b. Personal safety

____c. Use of equipment and supplies

____d. Group safety

3. Explain a proper safety attitude by completing the following statements:

a. Most accidents are caused by ____________________.

b. "Carrying on" in the classroom should be __________.

c. "Carrying on" makes a student more ______________ to accidents.

d. Each student must be on guard against accidents ____________________.

4. Describe the term personal safety.

5. Explain the difference between group safety and personal safety.

6. Place a "✓" beside those statements which are safety rules for the Office Duplication Practices classroom:

____a. All cords should be unplugged and wrapped around the machines if not in use.

____b. A plug should be held by the wire instead of by the plug.

____c. Always look down when walking in a classroom area where plugs are exposed.

____d. Keep the classroom floor free from papers and spills.

____e. Do not tell the teacher if any unusual conditions arise in the classroom.

____f. Keep all file drawers closed when not in use.

____g. It is okay to use materials and supplies for other than the intended purposes.

____h. If you are uncertain of any activity, ask the instructor.

____i. Jewelry, ties, scarves, and other types of clothing can be dangerous if worn when you are operating office machines.

____j. Horseplay should be kept to a minimum.

____k. Always unplug a machine first before making any adjustments on it.

____l. Talk clearly when working with others.

____m. Make sure that no other persons have their hands on a machine when planning to start a machine operation.

____n. In case of a paper jam, immediately pull the paper out.

____o. Keep hair away from face and shoulders when operating a machine.

7. Recognize the care of equipment in the Office Duplidation Practices classroom by answering the following:

    a. List the procedures to follow when a piece of equipment is not operating properly.

        (1)

        (2)

    b. Place a "✓" beside true statements concerning electrical equipment.

    ____(1) Grasp the cord instead of the electrical plug to unplug machines.

    ____(2) Always check electrical cords to see if they are damaged or frayed.

    ____(3) Always keep electrical equipment plugged in, even if it is not in use.

8. Place a "✓" beside Friday afternoon work activities.

____a. Clean outside areas of spirit duplicator.

____b. Clear small bits of paper from the drill bit of the paper drill.

____c. Clean rollers of the paper folder with bleach.

____d. Dust collator trays.

____e. Take apart and clean all typewriter parts.

____f. Wipe glass areas with glass cleaners.

____g. Run mimeograph machine if it has not been used recently.

9. Make a poster about classroom safety.

10. Write a paragraph on a classroom safety practice.

11. Develop a Friday afternoon cleanup schedule.

(NOTE: If activities 9-11 have not been completed prior to the test, ask the instructor when they should be completed.)

UNIT II

CLASSROOM SAFETY

ANSWERS TO UNIT TEST

1. 3 a. Accident
   1 b. Injury
   5 c. Unsafe act
   2 d. Unsafe condition
   4 e. OSHA

2. ✓ a.
   ✓ b.
   ✓ c.
   ✓ d.

3. a. carelessness
   b. avoided
   c. prone
   d. at all times

4. It involves protecting oneself from injury and being familiar with unsafe conditions.

5. Group safety involves the safety of all and takes a group effort. Personal safety is individual concern for one's own actions.

6. ✓ a.
   ___ b.
   ✓ c.
   ✓ d.
   ___ e.
   ✓ f.
   ___ g.
   ✓ h.
   ✓ i.
   ___ j.
   ✓ k.
   ✓ l.
   ✓ m.
   ___ n.
   ✓ o.

7. a. (1) Pull the electrical plug

(2) Tell the instructor, who may call a mechanic to inspect equipment and make any necessary repairs

b.

____(1)

__✓__(2)

____(3)

8. __✓__a.

__✓__b.

____c.

__✓__d.

____e.

__✓__f.

__✓__g.

9. Evaluated to the satisfaction of the instructor

10. Evaluated to the satisfaction of the instructor

11. Evaluated to the satisfaction of the instructor

UNIT III

HUMAN RELATIONS IN THE OFFICE SETTING

UNIT OBJECTIVE

After completing this unit, the student should be able to select from a list the characteristics of a good personality, characteristics of a good co-worker, reasons why people work, and basic ways of getting along with people. This knowledge will be evidenced through demonstration and by satisfactorily completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to:

1. Define personality.
2. List four reasons why we study personality.
3. Arrange in logical order the steps in improving one's personality.
4. Select from a list the characteristics of a good personality.
5. Select from a list the characteristics of a good co-worker.
6. Select from a list those personality traits that should be avoided.
7. Select from a list the reasons why people work and set goals.
8. Identify reasons why employees lose their jobs.
9. List three ways people are different.
10. Identify from a list some of the basic ways of getting along with people.
11. Answer questions concerning human relations with co-workers.
12. Complete a personality rating sheet.

UNIT III

HUMAN RELATIONS IN THE OFFICE SETTING

SUGGESTED ACTIVITIES

I. Instructor

   A. Provide student with objective sheet.

   B. Provide student with information and assignment sheets.

   C. Secure commercially available transparencies.

   D. Discuss unit and specific objectives.

   E. Discuss information and assignment sheets.

   F. Have students interview several employers and find out what personality traits would be desirable for each business.

   G. Have students give personality reports of themselves. Compare with how others view the same student, using the assignment sheet.

   H. Have students visit a complaint department and discuss the problems with which they must deal.

   I. Invite a first-rate salesperson or a similar resource person to discuss human relations in business with the class.

   J. Have class members make a survey of their reactions to the traits of good and poor salespeople.

   K. Use "What type of customer is the most difficult to please?" as a topic for discussion.

   L. Discuss the fact that more people lose their jobs because of human relation problems that for the lack of good office skills.

   M. Give test.

   N. Evaluate results.

II. Student

   A. Read objective sheet

B. Study information sheet.

C. Complete assignment sheet.

D. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit

   A. Objective sheet

   B. Information sheet

   C. Transparency Masters

      1. III-TM-1--Avoid "Politicking", "Snow Job", "Con Job"

      2. III-TM-2--Avoid "Passing the Buck"

      3. III-TM-3--Avoid "Apple Polishing", "Buttering up", or "Sweet Talking"

      4. III-TM-4--Don't form "Cliques"

      5. III-TM-5--Avoid "Gossiping" or "In Groups"

   D. Assignment sheets

      1. Assignment Sheet #1--Human Relations with Co-workers

      2. Assignment Sheet #2--Personality Rating Sheet

   E. Answers to assignment sheets

   F. Test

   G. Answers to test

II. References

   A. Carlile, Robert. Agricultural Sales and Services. Columbia, Missouri: Instructional Materials Laboratory, University of Missouri, 1976.

   B. Eggland, Steven A. and John W. Williams. Human Relations in Business. Cincinnati: South-Western Publishing Co., 1977.

   C. Human Relations in Business, Student Manual. Columbus, Ohio: Agricultural Education Services,

Ohio State University, 1971.

D. Laird, Donald A. and others. Psychology Human Relations and Motivation. 5th ed. New York: Gregg and Community College Division, McGraw-Hill Book Company, 1975.

E. Meehan, James R., Williams R. Pasewark, and Mary Ellen Oliverio. Clerical Office Procedures. 5th ed. Cincinnati: South-Western Publishing Co., 1973.

F. Russon, Allen R. Personality Development for Business. 4th ed. Cincinnati: South-Western Publishing Co., 1973.

UNIT III

HUMAN RELATIONS IN THE OFFICE SETTING

INFORMATION SHEET

I. Personality--All traits (emotions, attitudes, habits, behavior) that are shown by individuals.

II. Reasons to study personality

   A. To help us understand ourselves

   B. To help us understand others

   C. To better live in our society

   D. To improve our personalities

III. Steps in improving personality

   A. Decide that your personality can be improved

   B. Find out how your personality rates

   C. Analyze this rating trait-by-trait

   D. Decide what you can do

IV. Traits of a good personality

   A. Cheerfulness

   B. Friendliness

   C. Forcefulness

   D. Self-confidence

   E. Tactfulness

V. Characteristics of a good worker

   A. Follows business rules and policies

   B. Respects authority

   C. Carries out assigned duties

   D. Is able to go more than half way

   E. Is interested and alert

F. Shows respect and is thankful

G. Makes good use of ways to improve

H. Has new ideas

I. Is honest

VI. Personality traits that should be aboided

A. "Politicking", "Snow Job", or "Con Job"

B. "Passing the buck"

C. "Apple-polishing", "Buttering-up", or "Sweet-talking"

D. "Clique-forming", being in the "in group"

E. "Gossiping"

VII. Reasons why people work

A. To achieve satisfaction

B. To support family

C. To get along with others of the same age

D. To gain power

E. To earn money

F. To achieve goals

VIII. Reasons employees lose their jobs

A. Cannot get along with fellow-workers

B. Is absent a lot and is often late.

C. Takes extra-long break times

IX. Ways in which people differ

A. Life styles

B. Attitudes

C. Abilities

X. Basic ways of getting along with people

A. Keep a tight lip on your tongue; always say less than you think

(NOTE: Develop a low, persuasive voice. How you say something often means more than what you say

B. Make only those promises you know you can keep and keep them, no matter what it costs

C. Always try to say a kind and helpful about somebody

(Note: Praise good work no matter who did it. Criticism should be given helpfully, never spitefully.)

D. Be interested in others

(NOTE: Be interested in their goals, their welfare, their homes and families. Let everyone you meet feel that you regard them as fine individuals.)

E. Be cheerful

(NOTE: Keep the corners of your mouth turned up. Hide your pains, worries and disappointments under a pleasant smile. Laugh at told stories and learn to tell them.)

F. Don't argue

(NOTE: Discuss but don't argue. You can talk things out and still be friendly

G. Let your good points speak for themselves, and refuse to talk of another's weaknesses

(NOTE: Don't gossip, and make it a rule to say nothing of another unless it is something good.)

H. Be careful of others' feelings

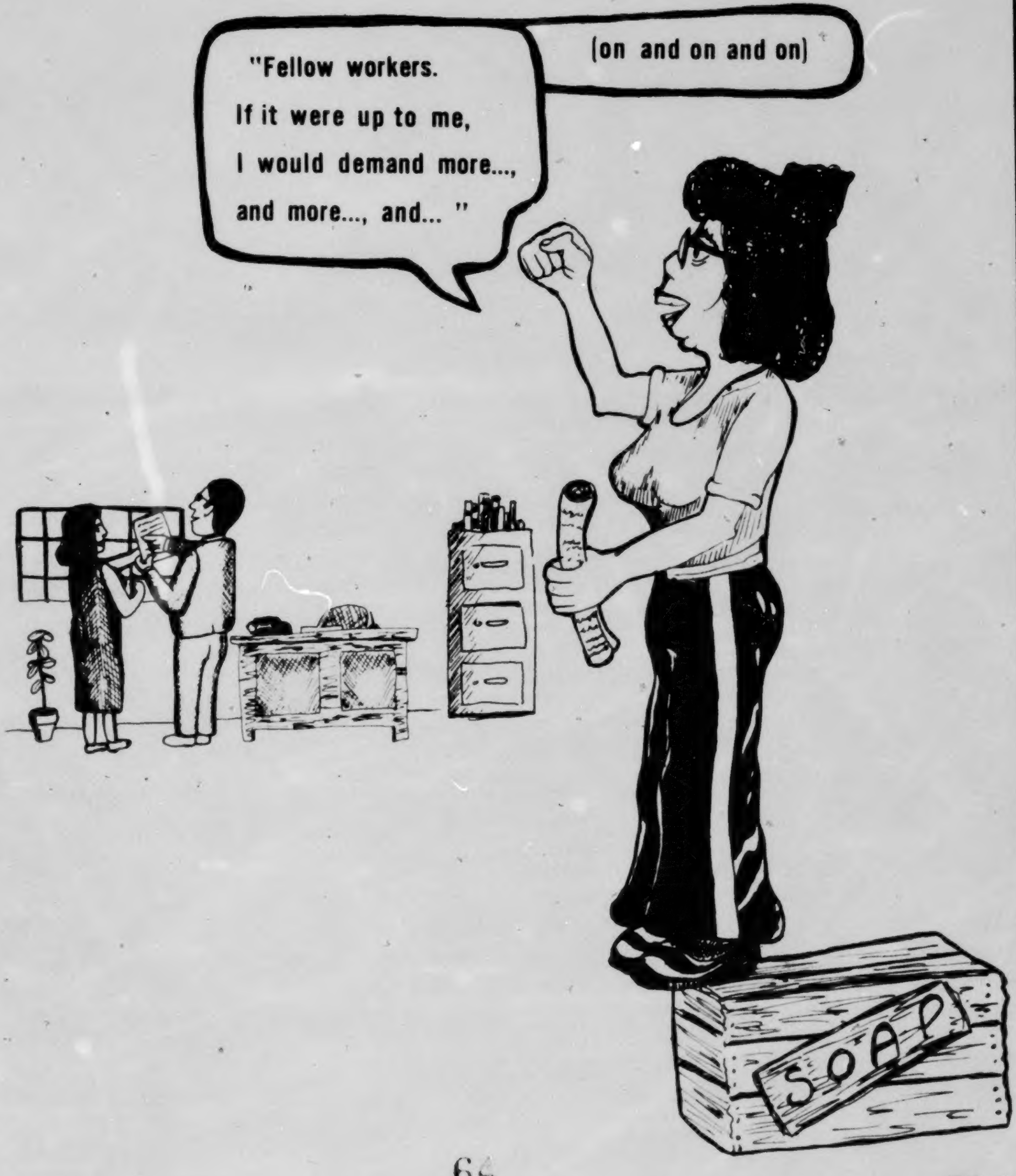
(NOTE: Joking about others can hurt them even when you think it doesn't)

I. Pay no attention to remarks about you that are rude or in bad taste.

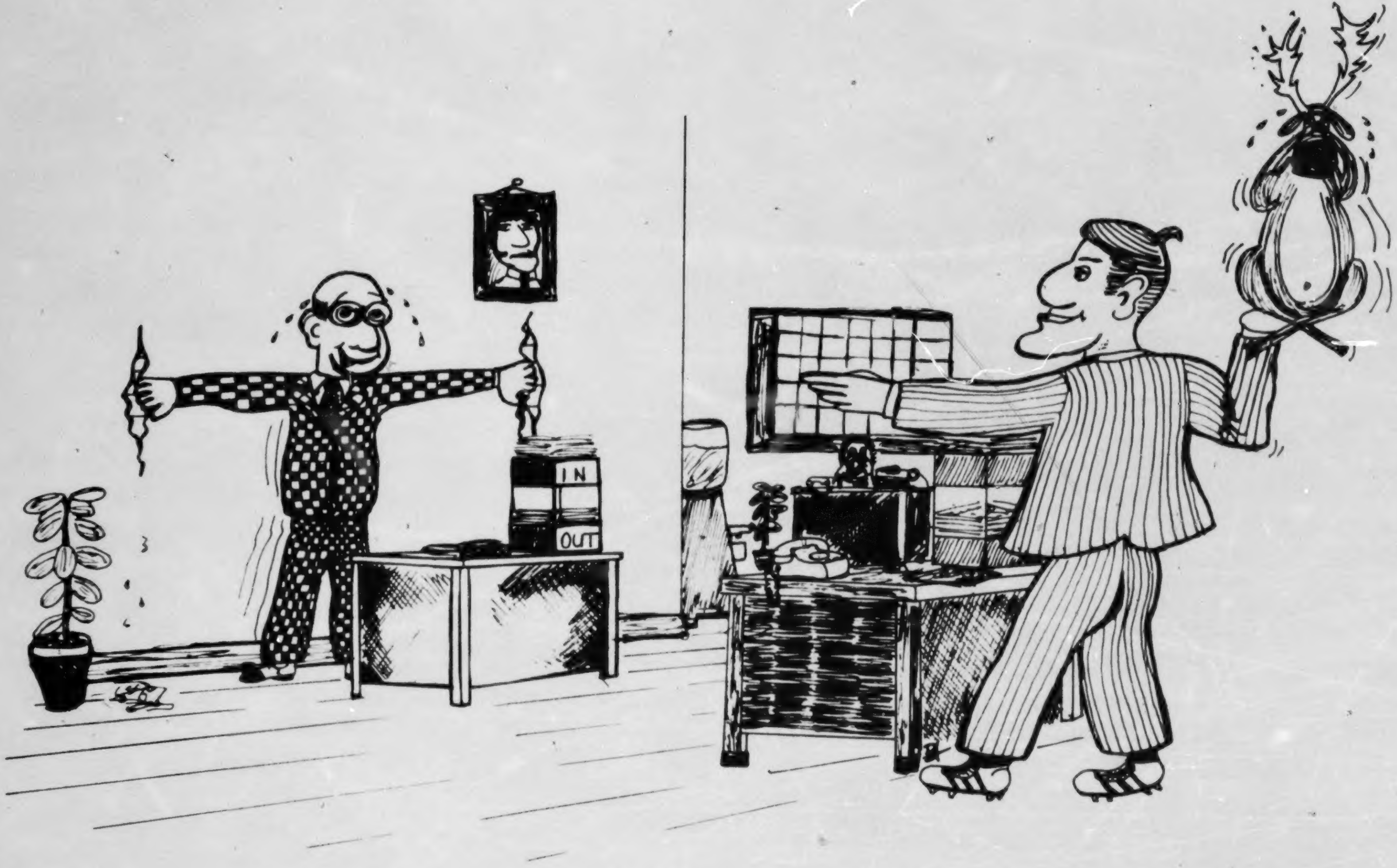
J. Don't be too anxious about getting praise

(NOTE: Do your work, be patient, keep your self on an even keel, and you will be respected and rewarded.)

AVOID "POLITICKING"


"Fellow workers.
If it were up to me,
I would demand more...,
and more..., and... "
(on and on and on)
SOAP

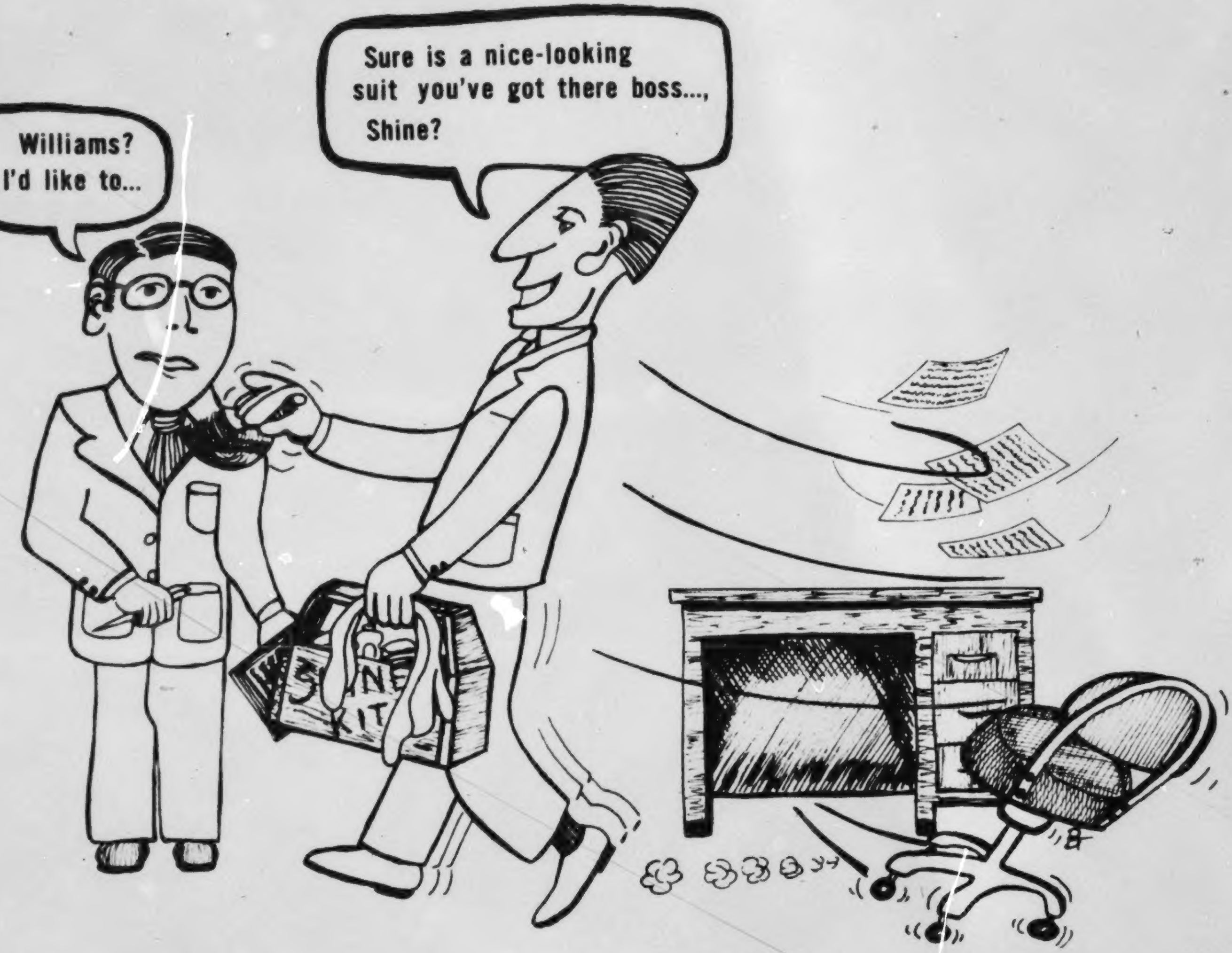
AVOID "PASSING THE BUCK"



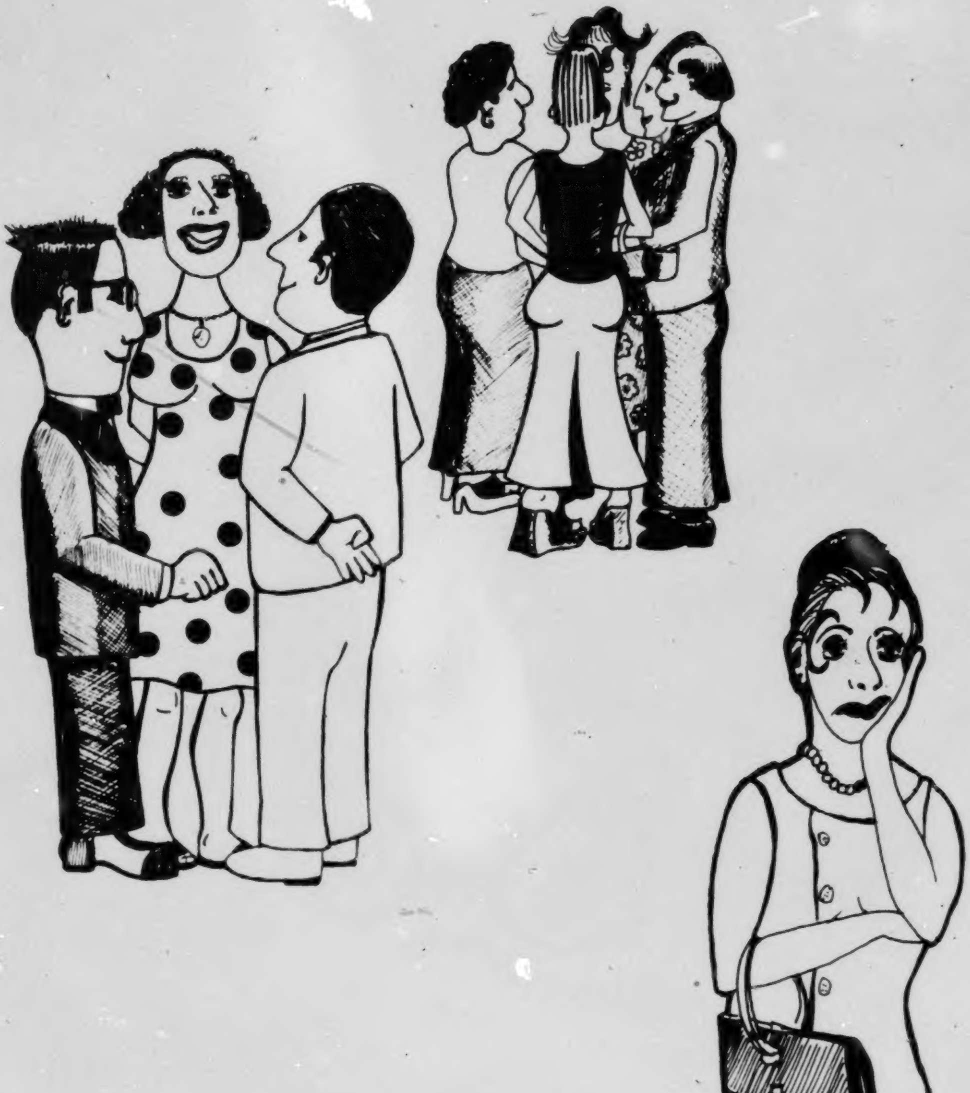
TM-2

III-13

AVOID "APPLE POLISHING"

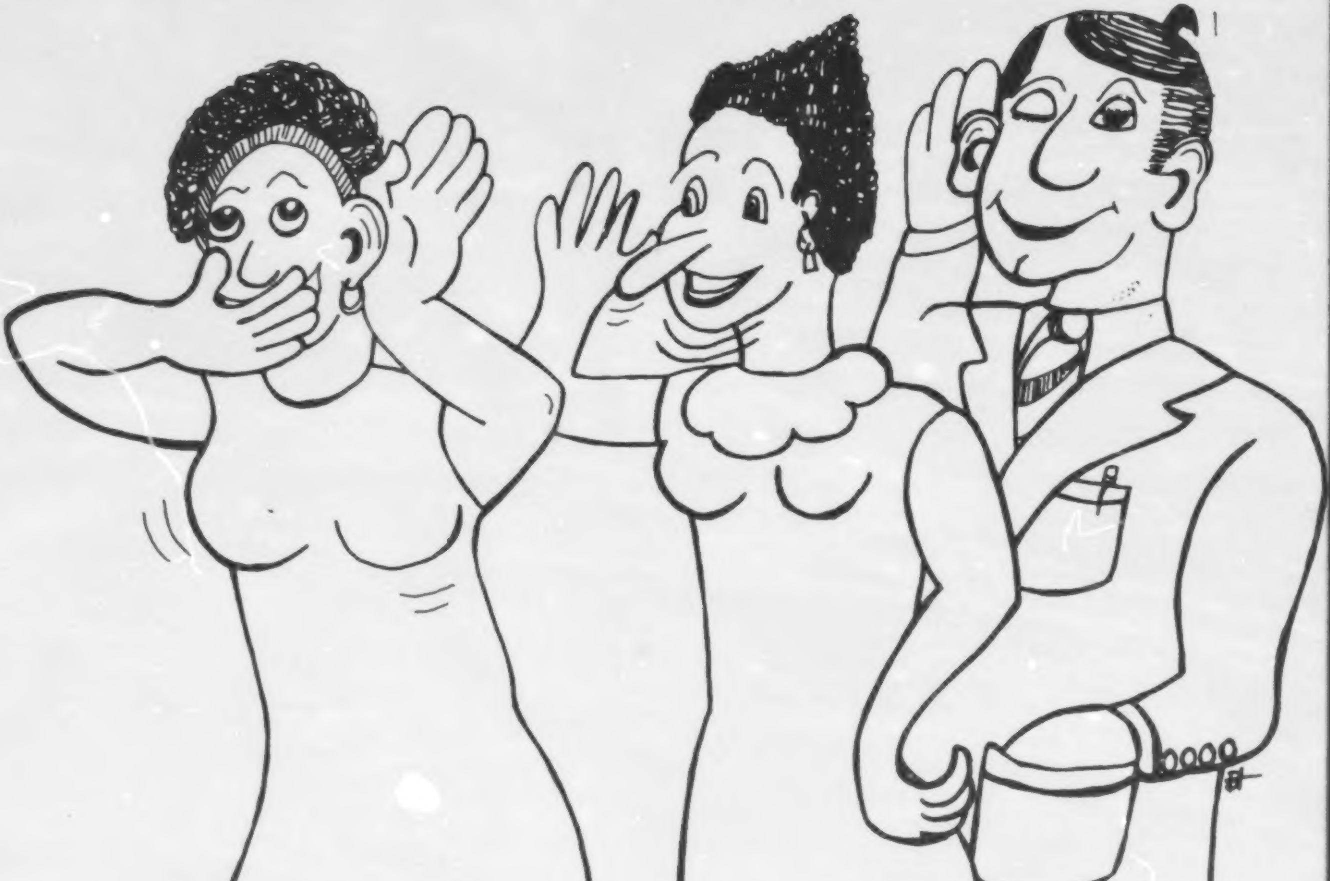

Williams?
I'd like to...
Sure is a nice-looking suit you've got there boss..., Shine?
SHINE KIT

DON'T FORM "CLIQUES" OR "IN GROUPS"



TM-4

AVOID "GOSSIPING"



UNIT III

HUMAN RELATIONS IN THE OFFICE SETTING

ASSIGNMENT SHEET #1--HUMAN RELATIONS WITH CO-WORKERS

Directions: Choose the word or phrase which you feel is the best answer to each of the following statements. Place your selection in the blank at the left. Discuss your answers.

_____1. Many occupations deal primarily with machines, equipment, or paper work; that is, they deal with things. In business, however, most of the jobs involve close contact with:

a. employers
b. supervisors
c. people
d. other workers

_____2. As a group, people are very much:

a. different
b. alike
c. It is hard to say

_____3. It is possible that the things which you enjoy may:

a. appeal to others
b. not appeal to others
c. be distasteful to others
d. all of the above

_____4. Which of the following do most people have in common?

a. right to work at a job of their choice
b. desire to get ahead
c. desire to be accepted and approved
d. all of these
e. none of these

_____5. The best way to achieve your goals in life is to follow your rights and desires and:

a. also the wish of your boss
b. what your parents say
c. the Golden Rule
d. just what you feel like doing

_____6. Do the best work you can for the important jobs and:

a. don't worry about the little jobs
b. let others do the little jobs
c. also do the most routine jobs
d. everything else will take care of itself

_____7. Plus doing the best work you can, it is important to:

a. learn as much as you can about your company
b. see what you can get on your boss
c. keep up on the latest gossip
d. be seen and not heard

_____8. The right to think and act as individuals ___ normally shar[illegible] by most.

a. is not
b. may be
c. is

_____9. The statement that "retailing is people" is:

a. not true
b. only part true
c. all true

____10. Which of the following is not a desirable trait of an employee?

a. sense of humor
b. tact
c. indifference
d. initiative

____11. Using others toward our own efforts is?

a. desirable
b. OK if you can get away with it
c. undesirable
d. not too bad

____12. When you are criticized by your superior, it is best to:

a. act indifferent
b. tell him to do it himself
c. take it constructively
d. shrug it off

_____13. Loyalty includes:

a. working-hours only
b. both the time to and from work
c. all the time
d. just when you feel like it

_____14. To approach your job with enthusiasm, it is necessary to:

a. fool the boss
b. impress your co-workers
c. be glad to be part of the team

_____15. It is not necessary to be friendly as long as you:

a. do your job
b. act as though you are
c. get to work on time
d. none of these

_____16. When you have a question, it is best to:

a. do the job the way you think it should be done
b. wait and ask it later
c. not bother your boss with it
d. ask it when it comes up

_____17. When you have joined a clique, you have:

a. picked sides
b. helped yourself
c. joined the "in" group
d. become a member of the team

_____18. A good way to get along in your new job is to:

a. be a "know-it-all"
b. be willing to learn
c. show your co-workers how smart you are
d. run to your boss with every question you have

_____19. Showing that you are not afraid of work means to:

a. work as hard as you can
b. be willing to tackle any job assigned
c. work harder than any of your co-workers

_____20. The need to show appreciation to fellow workers:

a. will get you nowhere
b. is strongest when you are new
c. isn't really necessary at all
d. is just on the surface

_____21. You should start calling your co-workers by their:

a. first names as soon as possible
b. nicknames to show you are really in
c. last name only
d. proper names until you have been around awhile or are told differently

_____22. If you do all of the things we have suggested you will have:

a. everyone liking you
b. a few friends
c. a better chance of being well-liked
d. the reputation for being an apple-polisher

_____23. The people you can learn the most from are:

a. always your bosses
b. your best buddies
c. those who show an interest in you
d. the ones you eat lunch with

_____24. Human behavior is usually

a. pretty easy to understand
b. not too predictable
c. easy to predict
d. none of your business

UNIT III

HUMAN RELATIONS IN THE OFFICE SETTING

ASSIGNMENT SHEET #2--PERSONALITY RATING SHEET

Directions: Use the rating sheet below to score a student in the class. Be as sincere as possible. Remember, you are helping your friends. Do not your writing or anything let the person know who you are. Be sure to hand back the completed rating through a mutual friend. Ask your instructor to explain any trait you don't understand.

NAME OF STUDENT BEING RATED

TRAIT	VERY GOOD	ABOVE AVERAGE	AVERAGE	BELOW AVERAGE	POOR
1. Posture					
2. Facial expression					
3. Health					
4. Grooming					
5. Dress					
6. Mannerisms					
7. Speech					
8. Bodily movements					
9. Intelligence					
10. Initiative					
11. Dependability					
12. Enthusiasm					
13. Sincere interest in others					
14. Honesty					
15. Courtesy					

	TRAIT	VERY GOOD	ABOVE AVERAGE	AVERAGE	BELOW AVERAGE	POOR
16.	Manners	____	____	____	____	____
17.	Respect for Others	____	____	____	____	____
18.	Emotional Control	____	____	____	____	____
19.	Self-confidence	____	____	____	____	____
20.	Integrity	____	____	____	____	____
21.	Loyalty	____	____	____	____	____
22.	Desire to work	____	____	____	____	____
23.	Acceptance of change	____	____	____	____	____
24.	Ability to decide	____	____	____	____	____
25.	Ability to accept criticism	____	____	____	____	____
26.	Tact	____	____	____	____	____
27.	Cheerfulness	____	____	____	____	____
28.	Alertness	____	____	____	____	____
29.	General knowledge	____	____	____	____	____

UNIT III

HUMAN RELATIONS IN THE OFFICE SETTING

ANSWERS TO ASSIGNMENT SHEETS

ASSIGNMENT SHEET #1

A good discussion is more important than 100% on the quiz.

1. d There is contact with all of these groups but the close contact is with other workers.
2. b This is a generalization but all people like to be treated with respect, considered important, treated fairly. There are many individual differences than within the group.
3. d All three of these apply--it could be any of these.
4. d
5. c Do unto others as you would have them do unto you.
6. c
7. a
8. c
9. b To be successful, the employee needs to know about the products, services, etc.
10. c
11. c
12. c
13. c
14. c
15. d
16. d
17. a
18. b

19. b

20. b

21. d This is part of respect.

22. c

23. c

24. a

ASSIGNMENT SHEET #2

Evaluated to the satisfaction of the instructor.

UNIT III

HUMAN RELATIONS IN THE OFFICE SETTING

UNIT TEST

1. Define personality.

2. List four reasons why we study personality.

   a.

   b.

   c.

   d.

3. Put the steps in improving your personality in the right order using numbers 1-5.

   _____a. Analyze this rating trait by trait

   _____b. Decide that your personality can be improved

   _____c. Work out your plan of action

   _____d. Find out your plan of action

   _____e. Develop a plan of action

4. Select from the list traits of a good personality by placing a "√" in the correct blanks.

   _____a. Cheerfulness

   _____b. Spitefulness

   _____c. Self-confidence

   _____d. Tactfulness

   _____e. Egotistical

   _____f. Forcefulness

5. Select from the list characteristics of a good fellow worker by placing a "√" in the correct blanks.

    _____a. Carrying out assigned responsibilities

    _____b. Criticizing company policy

    _____c. Doing only the work assigned to you

    _____d. Contributing new ideas

    _____e. Give support to business rules and policies

    _____f. Respect for authority

    _____g. Being critical of new ideas

6. Select from the list personality traits that should be avoided by placing a "√" in the appropriate blanks:

    _____a. "Passing the buck"

    _____b. "Dedication"

    _____c. "Loyalty"

    _____d. "Gossiping"

    _____e. "Apple-polishing"

    _____f. "Con Job"

    _____g. "Sweet-talking"

7. Select from the list reasons why people work by placing a "√" in the correct blanks.

    _____a. Support family

    _____b. Reach goals

    _____c. Guarantee quality schools

    _____d. Getting along with others of your age

    _____e. Decrease welfare rolls

8. Write the reasons why most employees lose their jobs.

9. List three ways people are different.

   a.

   b.

   c.

10. Select from the list basic ways of getting along with people by placing a "✓" in the correct blanks

    _____a. Be cheerful

    _____b. Complain often

    _____c. Talk about co-workers behing their back

    _____d. Keep an open mind on things that can be argued

    _____e. Be careful of others' feelings

    _____f. Voice your opinions often

    _____g. Be interested in others

11. Answer questions concerning human relations with co-workers.

12. Complete a personality rating sheet.

    (NOTE: If activities #10 and #11 have not been done prior to the test, ask your instructor when they should be completed.

UNIT III

HUMAN RELATIONS IN THE OFFICE SETTING

ANSWERS TO TEST

1. All traits that are shown by individuals.

2. a. To help us understand ourselves

   b. To help us understand others

   c. To better live in our society

   d. To improve our personalities

3. a. 3
   b. 1
   c. 5
   d. 2
   3. 4

4. ✓ a.
   ___ b.
   ✓ c.
   ✓ d.
   ___ e.
   ✓ f.

5. ✓ a.
   ___ b.
   ___ c.
   ✓ d.
   ✓ e.
   ✓ f.
   ___ g.

6. ✓ a.
   ___ b.
   ___ c.
   ✓ d.
   ✓ e.
   ✓ f.
   ✓ g.

7. ✓ a.
   ✓ b.
   ___ c.
   ✓ d.
   ___ e.

8. Most employees lose their jobs because they are either unable to get along with co-workers, poor work attendance, or abuse break times.

9. a. Background

   b. Attitudes

   c. Abilities

10. a, d, e, g

11. Evaluated to the satisfaction of the instructor.

12. Evaluated to the satisfaction of the instructor.

UNIT IV

GROOMING AND HYGIENE

UNIT OBJECTIVE

After completing this unit, the student should be able to identify and list terms and habits on grooming and personal hygiene, describe clothing appropriate for office wear, analyze grooming habits, plus plan and budget for a wardrobe. This knowledge will be evidenced through demonstration and by satisfactorily completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to:

1. Match terms on grooming and hygiene with their proper definitions
2. List proper daily personal hygiene habits
3. Identify the four basic food groups and provide an example of each
4. Distinguish proper sleeping habits
5. Describe clothing for an office setting
6. List factors to consider when planning a wardrobe
7. Analyze personal grooming habits
8. Construct posters illustrating basic food groups, proper dress, and personal hygiene
9. Budget a personal clothing wardrobe
10. Plan a personal clothing [illegible]drobe

UNIT IV

GROOMING AND HYGIENE

SUGGESTED ACTIVITIES

I. Instructor:

   A. Provide objective sheet

   B. Provide information and assignment sheets

   C. Make transparencies

   D. Discuss terminal and specific objectives

   E. Discuss information sheet

   F. If videotape equipment is available, have students walk around classroom. Play back tape and discuss styles of walking

   G. Invite representative from a cosmetic company to speak to class

   H. Conduct field trip to a local physical fitness center

   I. Suggest to students the possibility of having a "make up day

   J. Place a full-length mirror in classroom for students to check their appearance

   K. Have school nurse visit classroom to speak on proper nutrition

   L. Plan "dress up" day for students

   M. Visit cosmetology classroom if one is available

   N. Give test and evaluate results

II. Students:

   A. Read objectives

   B. Study information sheet

   C. Complete assignment sheets

   D. Take test

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objectives

  B. Information sheet

  C. Transparencies

    1. IV-TM-1--Planning for Good Grooming

    2. IV-TM-2--Improving Our Looks

    3. IV-TM-3--Personal Hygiene

    4. IV-TM-4--Basic Food Groups

    5. IV-TM-5--Height and Weight Chart--Boys

    6. IV-TM-6--Height and Weight Chart--Girls

  D. Assignment sheets

    1. Assignemnt Sheet #1--Grooming Self Analysis

    2. Assignment Sheet #2--Hygiene, Grooming and Foods

    3. Assignment Sheet #3--Wardrobe Budgeting

    4. Assignment Sheet #4--Wardrobe Planning

  E. Test

  F. Answers to test

II. References:

  A. Andrews, Margaret E. About Her. Dallas: Gregg Division, McGraw-Hill Book Company, 1968.

  B. About Him. Dallas: Gregg Division, McGraw-Hill Book Company, 1968.

  C. Curriculum and Instructional Materials Center. Cooperative Office Education. Stillwater, OK: Oklahoma State Board for Vocational and Technical Education, 1973.

  D. Krause, Marie V. and Martha A. Hunscher. Food, Nutrition and Diet Therapy. 5th ed. Philadelphia: W. B. Saunders Company, 1972.

E. Laird, Donald A. and others. *Psychology: Human Relations and Motivation*. 5th ed. Dallas: Gregg and Community College Division, McGraw-Hill Book Company, 1975.

F. Russon, Allien R. *Personality Development for Business*. 4th ed. Cincinnati: South-Western Publishing Co., 1973, pp. [illegible] 86.

G. Whitcomb, Helen and Rosaline Lang. *Today's Woman*. 3rd ed. Dallas: Gregg Division, McGraw-Hill Book Company, 1976, pp. 2-184.

H. Wodd, Merle W. and Margaret A. McKenna. *The Receptionist*. Dallas: Gregg Division, McGraw-Hill Book Company, 1966, pp. 17-54.

III. Training Aids

A. "We're Only Human" - 16 mm Film - Available from Motion Talking Picture Serivce, 4084 Westheimer Road, Houston, Texas. 77027.

B. "Fashion Designs on You" - 16mm Film - Available from American Sheep Producers Council, Dept. C.O., 200 Clayton Street, Denver, Colorado, 8026.

C. "The Beauty of You" - 16mm Film - Available from Association-Sterling Films, 8615 Directors Row, Dallas, Texas, 75427.

D. "Nutrition Is" - 16mm Film - Available from West Glen Films, 565 Fifth Avenue, New York, N.Y., 10017.

F. "Exercise & Grooming" - Transparencies available from University of Minnesota Education Center, Minneapolis-St. Paul, Minnesota.

UNIT IV

GROOMING AND HYGIENE

INFORMATION SHEET

I. Terms and Definitions

A. Accessories--Jewelry and extra clothing items which add style to basic clothing apparel

B. Acne--Skin disease common among teenagers

C. Adaptable--The ability to adjust in a wide variety of situations

D. Antiperspirant--Preparation that keeps underarms dry

E. Deodorant--Preparation that keeps underarms odor-free

F. Astringents--Lotions containing some alcohol and usually patted on the face

G. Comparison--Looking at different things and describing how they are similar or different

H. Compliment--Words of praise or approval

I. Conspicuous--Something that is obvious, noticeable and usually not in good taste ("Flashy," "Trashy," or "Not Cool")

J. Cosmetics--Beauty-aid products

K. Cuticle--Thin dead skin at the sides and base of a fingernail or toenail

L. Depilatory--A preparation for removing hair; can be bought as lotion, foam, or wax

M. Fatigue--Being tired

N. Harmonize--Colors and styles combined to produce an effect pleasing to the eye (Also called color-coordination)

O. Immaculate--Very clean

P. Hand and body lotion--A cream or liquid used to make the skin smooth and soft

Q. Manicure--To file and buff nails and to trim cuticules

R. Personality--All traits (emotions, attitudes, habits, behavior) that are shown by individuals

S. Schedule--Timetable of activities

T. Wardrobe--The clothes one has to wear

II. Daily Personal Hygiene and Grooming Habits

A. A daily bath or shower, including shampooing hair if needed, is necessary.

B. Clean, brushed teeth make for a pleasant smile and a healthy mouth. Brushing should be done as often as possible. Use dental floss once a day.

C. A clean, well-shaven face shows neatness in a man. Girls should shave legs and underarms as needed.

D. Use a deodorant or anti-perspirant after the daily bath. Choose a stick, roll-on, cream, or spray. (You may not smell your own body odor, but others will if you do not keep yourself clean.)

E. Nails should be kept clean and filed smoothly.

F. Well-groomed hair always looks nice. Extreme styles should be avoided by both males and females.

G. "Primping" in a public place is poor manners. There is a proper time and place for grooming.

III. Weight and Basic Food Groups

A. To look trim and alert, people should try to keep their weight within the normal limits of their height and bone structure.

B. Proper foods, along with enough sleep and some daily exercise give one a clear skin, shiny hair, strong fingernails,and a glowing appearance.

C. There are four basic food groups

1. Milk group--Includes cheese, ice cream, yogurt, cottage cheese, etc., in addition to milk.

2. Meat group--Includes meats, such as beef, pork, chicken, etc.

3. Vegetables and fruits--Includes dark green vegetables, citrus fruits, and tomatoes.

4. Breads and cereals--Includes enriched and whole grain products.

D. Daily servings from the basic food groups vary with age, but for teenagers, the following servings are recommended:

1. Milk group--four servings

2. Meat group--two or more servings

3. Vegetables and fruits--four or more servings

4. Breads and cereals--four servings

IV. Good Sleeping Habits

A. Try to get to bed at about the same time every night

B. Get some exercise every day

C. Let your mind be a blank blackboard, and erase your worries

D. Avoid foods which are hard for you to digest

E. Make sure bed covering is right for the weather

F. Wear comfortable sleeping garments

G. Darken bedroom and shut out noises, if possible

V. Clothing Selection

A. Wear clothes that look best on you and choose those that are easy to take care of

B. Neatness is a must, and clean, properly fitted clothes help a person look well-dressed.

C. Listed below are essentials of clothing appropriate for office wear

1. Clean and well-pressed clothes are a must

2. Clothes must be free from rips, tears, missing buttons, sagging hemlines, etc.

3. Hem lengths and necklines should not be extreme

4. Simple clothing is always in style

5. Too "sporty" or too "dressy" clothing is not proper in the office

6. Shoes must be kept clean, polished and in good repair

7. Hosiery must be free from snags and runners

8. Undergarments should not show either below, above, or under outer clothing

9. Jewelry should be kept simple

10. Well-fitted clothing is always in good taste

D. Clothing does not have to be the latest in fashion to be appropriate for work, but it must be clean, neat, and well fitting.

VI. Things to Look for When Planning a Wardrobe

A. Fit and comfort

B. Appropriateness

C. Your personality

D. Figure problems

E. Price of items and total clothing budget

F. Workmanship (quality)

G. Fabric and upkeep required

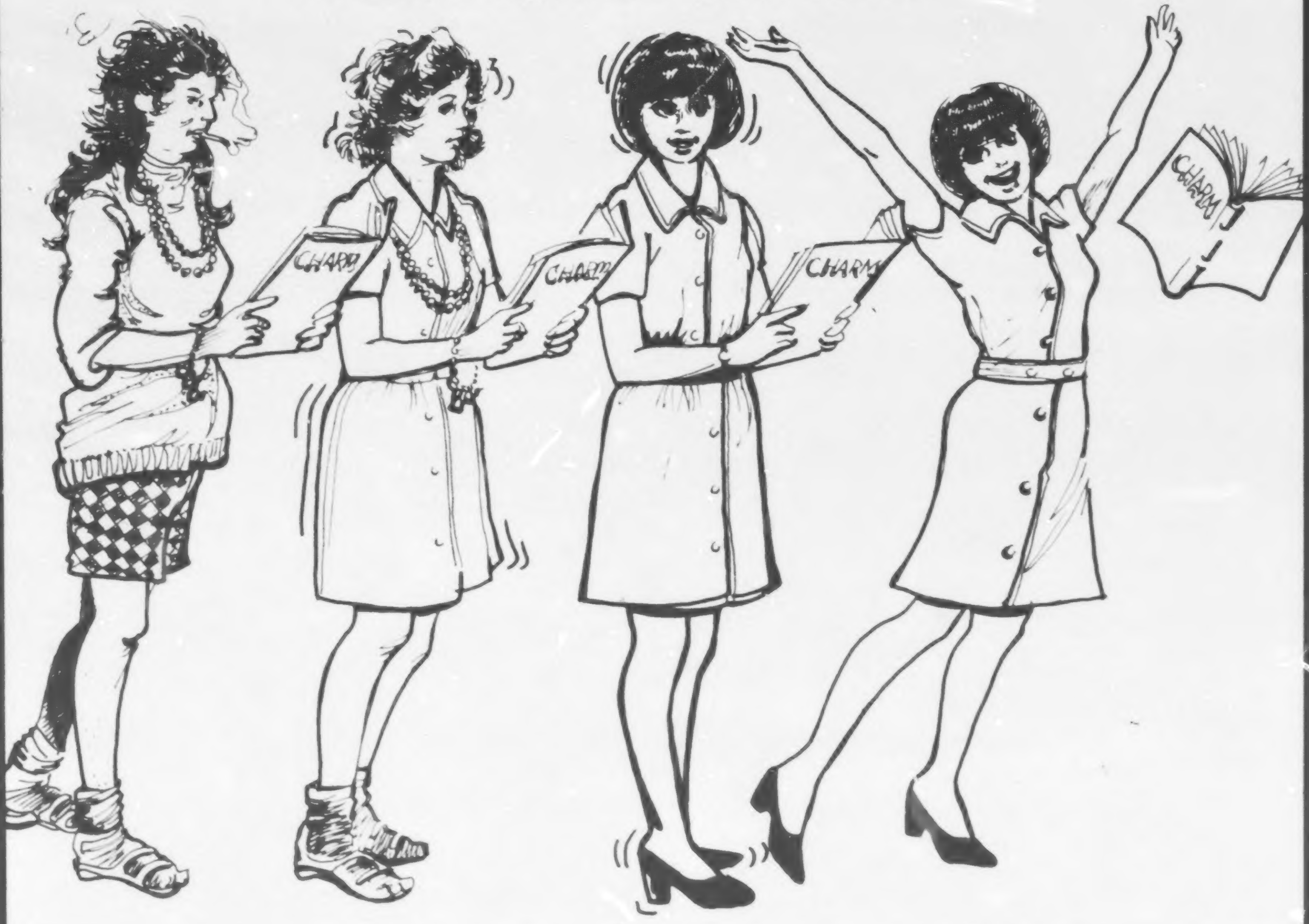
H. Color, line and style

I. How long the garment will last

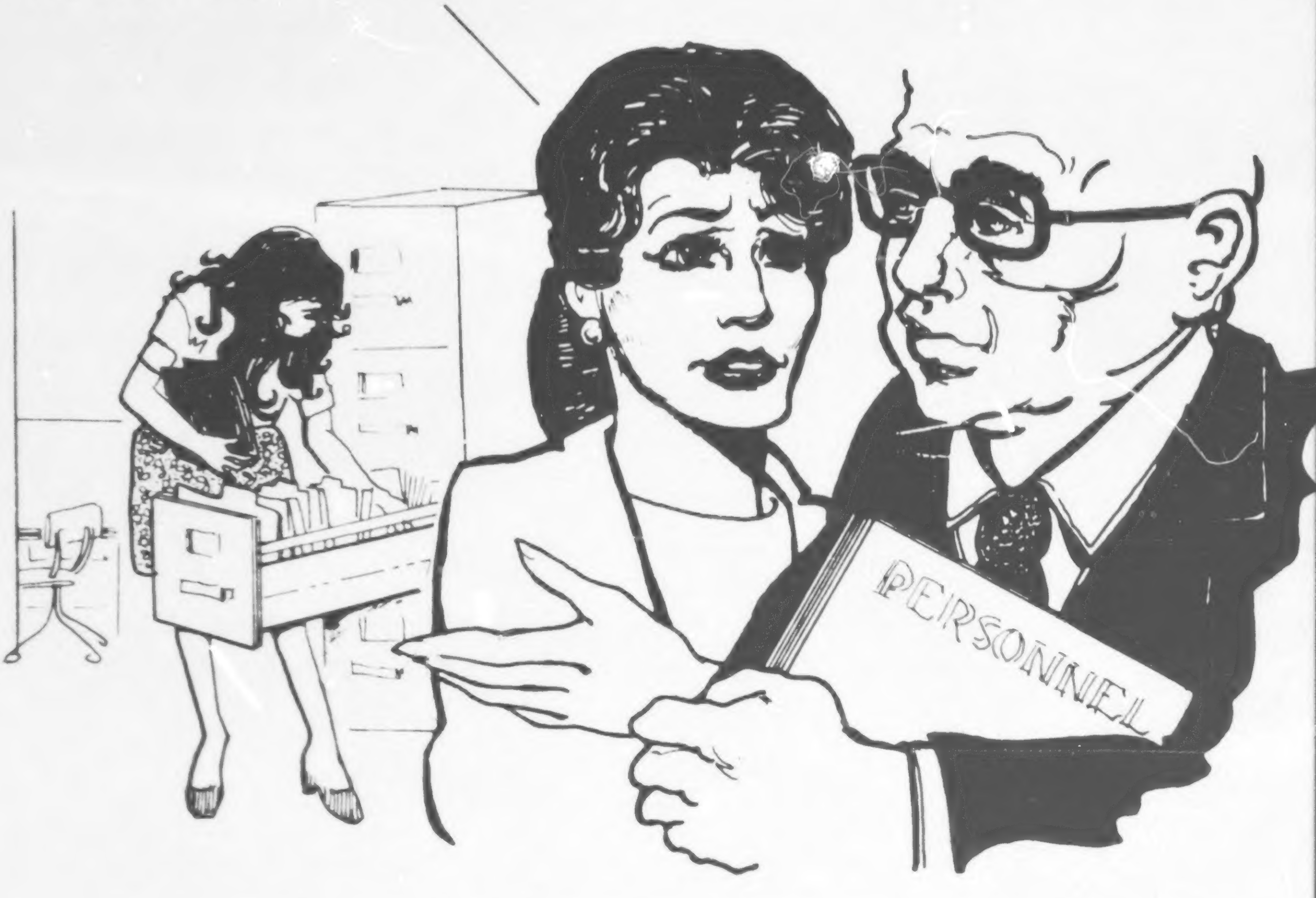
J. Clothes already in wardrobe

HOW WILL YOU SPEND YOUR GROOMING TIME?

LET'S IMPROVE OUR LOOKS


CHARM
CHARM
CHARM
CHARM

She knows the job all right. But I don't think she has ever taken a bath. I just don't want her hired for my department.



BASIC FOOD GROUPS

Milk Group

Meat Group

Vegetables and Fruits

Breads and Cereals

HEIGHT-WEIGHT-AGE TABLE FOR BOYS OF SCHOOL AGE

Ht. Ins	5 Yrs	6 Yrs	7 Yrs	8 Yrs	9 Yrs	10 Yrs	11 Yrs	12 Yrs	13 Yrs	14 Yrs	15 Yrs	16 Yrs	17 Yrs	18 Yrs	19 Yrs	Ht. Ins
38	34	34														38
39	35	35														39
40	36	36														40
41	38	38	38													41
42	39	39	39	39												42
43	41	41	41	41												43
44	44	44	44	44												44
45	46	46	46	46	46											45
46	47	48	48	48	48											46
47	49	50	50	50	50	50										47
48		52	53	53	53	53										48
49		55	55	55	55	55	55									49
50		57	58	58	58	58	58	58								50
51			61	61	61	61	61	61								51
52			63	64	64	64	64	64	64							52
53			66	67	67	67	67	68	68							53
54				70	70	70	70	71	71	72						54
55				72	72	73	73	74	74	74						55
56				75	76	77	77	77	78	78	80					56
57					79	80	81	81	82	83	83					57
58					83	84	84	85	85	86	87					58
59						87	88	89	89	90	90	90				59
60						91	92	92	93	94	95	96				60
61							95	96	97	99	100	103	106			61
62							100	101	102	103	104	107	111	116		62
63							105	106	107	108	110	113	118	123	127	63
64								109	111	113	115	117	121	126	130	64
65								114	117	118	120	122	127	131	134	65
66									119	122	125	128	132	136	139	66
67									124	128	130	134	136	139	142	67
68										134	134	137	141	143	147	68
69										137	139	143	146	149	152	69
70										143	144	145	148	151	155	70
71										148	150	151	152	154	159	71
72											153	155	156	158	163	72
73											157	160	162	164	167	73
74											160	164	168	170	171	74

HEIGHT-WEIGHT-AGE TABLE FOR GIRLS OF SCHOOL AGE

Ht. Ins	5 Yrs	6 Yrs	7 Yrs	8 Yrs	9 Yrs	10 Yrs	11 Yrs	12 Yrs	13 Yrs	14 Yrs	15 Yrs	16 Yrs	17 Yrs	18 Yrs	Ht. Ins
38	33	33													38
39	34	34													39
40	36	36	36												40
41	37	37	37												41
42	39	39	39												42
43	41	41	41	41											43
44	42	42	42	42											44
45	45	45	45	45	45										45
46	47	47	47	48	48										46
47	49	50	50	50	50	50									47
48		52	52	52	52	53									48
49		54	54	55	55	56	56								49
50		56	56	57	58	59	61	62							50
51			59	60	61	61	63	65							51
52			63	64	64	64	65	67							52
53			66	67	67	68	68	69	71						53
54				69	70	70	71	71	73						54
55				72	74	74	74	75	77	78					55
56					76	78	78	79	81	83					56
57					80	82	82	82	84	88	92				57
58						84	86	86	88	93	96				58
59						87	90	90	92	96	100	103	104		59
60						91	95	95	97	101	105	108	109	111	60
61							99	100	101	105	108	112	113	116	61
62							104	105	106	109	113	115	117	118	62
63								110	110	112	116	117	119	120	63
64								114	115	117	119	120	122	123	64
65								118	120	121	122	123	125	126	65
66									124	124	125	128	129	130	66
67									128	130	131	133	133	135	67
68									131	133	135	136	138	138	68
69										135	137	138	140	142	69
70										136	138	140	142	144	70
71										138	140	142	144	145	71

UNIT IV

GROOMING AND HYGIENE

ASSIGNMENT SHEET #1--GROOMING SELF ANALYSIS

Directions: Rate yourself on each of the following questions. Use a scale of "6" Always, "4" Usually, "2" Occasionally, and "0" Never. When you have completed the evaluation, total your score and compare it to the rating scale provided.

QUESTIONS — RATING

1. Do you take a bath or shower daily? ______
2. Do you use an effective deodorant or antiperspirant daily? ______
3. Do you use a foot spray or powder daily? ______
4. Do you shave as often as needed? ______
5. Do you put on clean undergarments daily? ______
6. Do you put on clean hose or socks daily? ______
7. Do you clean your face thoroughly at least twice a day (more often if you have oily skin)? ______
8. Do you completely remove makeup before bedtime? ______

10. Do you push cuticles back as you dry hands and feet after bathing? ______
11. Do you check fingernails daily and repair as necessary? ______
12. Do you check eyebrows daily for stray hairs that need to be removed? ______
13. Do you wash and/or set hair weekly (more often if needed)? ______
14. Do you brush hair vigorously every day? ______
15. Do you have hair cut or trimmed regularly? ______
16. Do you use a dandruff shampoo and/or cream rinses and conditioners if needed? ______

QUESTIONS	RATING
17. Do you brush your teeth at least twice daily?	______
18. Do you use a mouthwash daily?	______
19. Do you make the daily effort to apply makeup so that it looks fresh and natural?	______
20. Do you get enough sleep and rest so that you feel refreshed?	______
21. Do you take a good look at yourself in a full mirror before leaving the house?	______
22. Do you take a few minutes during the day to freshen your looks and comb your hair?	______
23. Do you wash your clothes regularly?	______
TOTAL	____________

RATING

110 - 126	You take pride in your appearance
94 - 109	You'd probably pass inspection
79 - 93	You're not really trying
Less than 79	Your best friend won't even tell you

UNIT IV

GROOMING AND HYGIENE

ASSIGNMENT SHEET #2--HYGIENE, GROOMING AND FOODS

Directions: Make a poster on each of the following areas.

1. Food groups and examples of each
2. Proper and improper dress
3. Proper hygiene and grooming habits

UNIT IV

GROOMING AND HYGIENE

ASSIGNMENT SHEET #3--WARDROBE BUDGETING

Directions: With $200 plan a wardrobe, using one or more department store catalogs. This wardrobe is to be planned for both leisure time and office wear. Make sure the wardrobe does not cost more than the amount of money you have.

UNIT IV

GROOMING AND HYGIENE

ASSIGNMENT SHEET #4--WARDROBE PLANNING

Directions: Using clothing catalogs, newspapers, and magazines, plan your wardrobe for a week. Cut out the clothes you would wear and include all accessories. Paste up your clothing selections on paper and display your new "attire" to your class members. Have other classmates comment on your selections.

(Note: This activity is for both males and females.)

UNIT IV

GROOMING AND HYGIENE

UNIT TEST

I. Match the terms on the left with their correct definitions.

TERMS

____accessories

____acne

____adaptable

____antiperspirant

____astringents

____comparison

____compliment

____conspicuous

____cosmetics

____cuticle

____deodorant

____depilatory

____fatigue

____harmonize

____immaculate

____hand and body lotion

____manicure

____personality

____schedule

____wardrobe

DEFINITIONS

a. establishing a timetable of activities

b. very clean

c. beauty-aid products

d. being tired

e. skin disease common among teenagers

f. jewelry and extra clothing items

g. combining color and style

h. cream or liquid used to make skin soft and smooth

i. thin, dead skin at sides and base of fingernails

j. something obvious, noticeable and not in good taste

k. looking at different things and describing how they're similar or different

l. words of praise or approval

m. to file and buff nails and to trim cuticles

n. preparation for removing hair

o. the clothes one has available to wear

p. all traits shown by individuals

q. lotions containing some alcohol and usually patted on the face

r. being able to adjust in a wide variety of situations

s. preparation that keeps underarms dry

t. preparation that keeps underarms odor-free

2. List correct daily personal hygiene habits.

3. Identify the four basic food groups and give an example of each.

4. Place a "✓" beside those items which are good sleeping habits.

_____Try to go to bed at the same time every night

_____Get a proper amount of sleep

_____Forget about worries when getting to bed

_____Eating a heavy meal helps an individual to sleep better

_____Make sure bed covering is adequate

_____Sleep in comfortable sleeping garments

_____Darken room and close door to shut out noises

5. Briefly describe what kind of clothing is best in an office setting.

6. When planning a wardrobe list things to look for.

7. Analyze personal grooming habits.

8. Make posters showing basic food groups, proper dress, and personal hygiene.

9. Plan the cost of a personal clothing wardrobe.

10. Plan a personal clothing wardrobe.

(Note: If activities #7 through #10 have not been accomplished prior to the test, ask the instructor when they should be completed.)

UNIT IV

GROOMING AND HYGIENE

ANSWERS TO UNIT TEST

1. f accessories
e acne
r adaptable
s antiperspirant
q astringents
k comparison
l compliment
j conspicuous
c cosmetics
i cuticle
t deodorant
n depilatory
d fatigue
g harmonize
b immaculate
h hand and body lotion
m manicure
f personality
a schedule
d wardrobe

2. A daily bath, to include shampooing hair if needed
Clean, brushed teeth
A clean, well-shaven face (if appropriate)

Application of deodorant

Clean and manicured nails

Well-groomed hair

3. Milk group--cheese, ice cream, yogurt, etc.

   Meat group--ham, chicken, etc.

   Vegetable and fruit group--green beans, citrus fruits, etc.

   Breads and cereals--whole wheat bread, etc.

4. __T__

   __T__

   __T__

   ______

   __T__

   __T__

5. The answer should include the following:

   The clothing must be neat, clean, and easy to care for. The style should be simple and not too dressy or sporty. It must fit well and be accompanied by simple accessories.

6. a. fit and comfort

   b. appropriateness

   c. your personality

   d. figure problems

   e. price of item and total clothing budget

   f. quality

   g. fabric and upkeep required

   h. color, line, and style

   i. how long the garment will last

   j. clothes already in wardrobe

7. Evaluated to the satisfaction of the instructor.
8. Evaluated to the satisfaction of the instructor.
9. Evaluated to the satisfaction of the instructor.
10. Evaluated to the satisfaction of the instructor.

UNIT V

TELEPHONE COMMUNICATIONS

UNIT OBJECTIVE

After completing this unit, the student should be able to demonstrate in role-playing situations the ability to correctly handle incoming calls, place both local and long distance calls, and use the telephone directory. Knowledge of this material will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student should be able to:

1. Define terms associated with telephone communications
2. Name the qualities of good telephone personality
3. Select from a list the factors that add to the success of business calls
4. List the ways telephone courtesy is expressed
5. Name the basic purposes of most business calls
6. Identify appropriate procedures for planning and placing business calls
7. Identify appropriate procedures for answering and handling business calls
8. List the purposes of the telephone directory
9. List the organization headings of the telephone directory and include examples of the types of information found
10. Name the types of telephone equipment in common use
11. Demonstrate the ability to:
    a. Role-play proper use of the telephone
    b. Use the telephone directory to find given information

UNIT V

TELEPHONE COMMUNICATIONS

SUGGESTED ACTIVITIES

I. Instructor:

   A. Provide objective sheet

   B. Provide information sheets and assignment sheets

   C. Discuss objectives

   D. Discuss information sheets and assignment sheets

   E. Order teletrainer and Teletraining for Business Studies

   F. Demonstrate proper procedures for using the telephone

   G. Assign bulletin board responsibilities

   H. Give test and evaluate results

II. Student:

   A. Read objective sheet

   B. Study information sheets

   C. Design bulletin board

   D. Complete assignment sheets

   E. Take test

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objectives

   B. Information sheets

   C. Assignment sheets

      1. Assignment Sheet #1--Role-Play Situations For Telephone Usage

    2. Assignment Sheet #2--Use the Telephone Directory

  D. Test

  E. Answers to test

II. References:

  A. Book: Teletraining for Business Studies, American Telephone and Telegraph Company, 1965.

  B. Booklets--Available through your local telephone company

    1. "The Secretary and the Telephone"
    2. "Tips for Succeeding in Business by Telephone"
    3. "Telephone Personality Tips"
    4. "How to Succeed in Business by Telephone"
    5. "How to Make Friends by Telephone"
    6. "The Hunter's Guide"
    7. "Teletraining"
    8. "Research and Development in the Bell System"
    9. "Alexander Graham Bell"
    10. "How the Telephone Works"
    11. "The Telephone in America"

  C. Films:

    1. "About a Century" (28 minutes, color) A nostalgic and dynamic story about how the United States and the telephone business grew up together. The story unfolds at the 1876 Centennial Exposition in Philadelphia to reveal new U.S. scientific discoveries, including the telephone. Features historic film footage to recapture the days that brought us the horseless carriage, radio, movies, television - and all the fads in music, dancing, sports.

    2. "All Kinds of People" (28 minutes, color) Provides an insight into operations of the

Bell System, with emphasis on telephone people and their dedication to customer service. Story is told in terms of telephone employees, the work they do, and their feelings about their jobs.

3. "A Most Notable Century" (12 minutes, color) Depicts the parallel growth of the nation and its telecommunications system from 1876 to the present.

4. "An American Dream" (14 minutes, color) Highlights the fads, music, sports, and technology of the past century including important advancements in modern day telecommunications.

5. "Operator" (15 minutes, color) A fascinating inside look at the skills needed by telephone operators in dealing with the public. Made especially for the young in mind and spirit, it portrays the modern telephone operator's job, showing it to be important, demanding, challenging and rewarding. Newly revised.

6. "Performance" (9 minutes, color) Shows unique and stringent tests telephone sets undergo at assembly plant before they are ready for customer use. Original music underscores the meaning and keeps film entertaining as it shows how reliability of telephone instruments is a prerequisite to good service.

7. "Touch-Tone Telephones" (19 minutes, color) Explains how a bank uses TOUCH-TONE telephones and a computer to talk to people using prerecorded words to answer. Scenes show a department store sales-girl obtaining an instant credit check on a customer; a housewife paying bills by telephone; a nurse handling a doctor's billing service.

8. "Network" (13 minutes, color) This multiple-image film shows the vital part the telephone switching network plays in improving the quality of our everyday lives. Shows network bringing the knowledge explosion via voice, data and video information within the reach of everyone.

9. "How to Lose Your Best Customer . . . Without Really Trying" (28 minutes, color) Pat Harrington, Jr., in the role of a businessman, sees how a series of badly handled telephone

calls result in a cancelled contract. Later, through flashbacks, he's shown how common sense and courtesy could have prevented the situation. Brings out practical ways to achieve telephone courtesy.

10. "I Rather Like You, Mr. Bell" (27 minutes, color) Through the phone-fun world of comedian Bob Newhart, the film explains courteous and effective telephone usage by picturing humerous historical situations in which the telephone might have played an important role-had it been invented then. Winner of six film festival awards.

    (Note: To order the above films, write to Association-Sterling Films, 8615 Directors Row, Dallas, Texas 75247)

D. Miscellaneous:*

1. Film catalogs from Southwestern Bell Film Library or Gulf States United Telephone Company
2. Southwestern Bell Booklet Catalog
3. Business Equipment Packet
4. Charts for *Teletraining for Business Studies*
5. Flashcards - "Speaking Over Barriers"

*Contact your nearest telephone representative.

UNIT V

TELEPHONE COMMUNICATIONS

INFORMATION SHEET

I. Terms and definitions

   A. Area code--A three digit number which reaches a section of the country being called

   B. Classifications--The headings in the yellow pages listing types of firms (e.g. doctors, lawyers, car garage, etc.)

   C. Converse--To talk with another person

   D. Cross references--Titles that show where a listing may be found

   E. Indented listings--Extra telephone numbers to show where a party may be reached

   F. Trademark headings--The titles that list dealers and firms under brand names

   G. Telephone personality--The image of a person over the telephone from what is said and how it is said

II. Telephone personality

   A. What you say and how you say it form your image over the telephone

   B. The tone of your voice gives meaning to what is said

   C. Your voice and manner of speaking can make an impression even without seeing the other person

III. Qualities of a good telephone personality

   A. Pleasant

   B. Friendly

   C. Interest

   D. Sincerity

- E. Helpful
- F. Natural

IV. Factors that add to the success of business calls

- A. Choice of words
    - 1. Give clear meanings
    - 2. Avoid slang words or phrases
    - 3. Use short, simple, descriptive words
    - 4. Be courteous
    - 5. Use the person's name when possible
- B. Tone of voice
    - 1. Speak directly into mouthpiece
    - 2. Use normal voice; don't shout
    - 3. Speak clearly
    - 4. Speak naturally--not too fast or too slowly
    - 5. Change tone quality
- C. Personal interest and attention to the phone conversation
    - 1. Listen carefully
    - 2. Express real interest in the other person's point of view
    - 3. Let the other person tell his/her story completely and do not interrupt if possible
    - 4. Ask questions

V. How telephone courtesy is expressed

- A. Answer the call pleasantly and promptly
- B. Use proper identification
- C. Give the purpose of the call clearly

    D. Ask questions clearly

    E. Give assistance and offer information

    F. Use such phrases as "please" and "thank you"

    G. Give complete attention to the conversation

    H. Avoid long conversations except if necessary

    I. End the call properly and replace the receiver gently

    J. Allow a short time between calls if you must place several calls

VI. Basic purposes for most business calls

    A. To give information or directions

    B. To get information or directions

    C. To ask someone to do something

VII. Correct procedures for planning and placing a business call

    A. Planning the call

        1. Make a list of information needed

            a. Purpose or reason for making call

            b. Name of person to be reached

            c. Points to be covered (directions, descriptions, dates, etc.)

            d. Questions to be asked

        2. Have necessary materials at telephone

            a. Pad and pencil

            b. Calendar

            c. Appointment schedule

            d. Notes on what is to be talked

        3. Decide best time to call

        a. Business hours or lunch hours

        b. Time of day in other time zone

    4. Determine type of call to be made

        a. Local

        b. Long distance (station-to-station or person-to-person)

B. Dialing the telephone number

    1. Lift receiver and listen for the dial tone before you begin to dial

    2. Use the index finger to dial each letter and/or numeral

    3. Move the dial all the way to the finger stop, then release it

    4. Let the dial return to its normal position without interrupting or forcing it before dialing the next numeral

    5. Avoid use of the letter "l" for the number "one" or the letter "O" for the number zero

    6. Touch-tone phones are being used more and more, in homes as well as businesses. The only difference is instead of dialing the number, buttons are pushed

C. Conversing

    1. Hold the transmitter or mouthpiece so that you speak right into it

    2. Use a normal voice tone, showing interest

    3. Speak clearly

    4. Speak unhurriedly--not too fast or too slowly

    5. Ask for the extension, person, or department if you reach a switchboard operator or someone other than the person you are calling

6. Identify yourself and your company when the person you are calling answers
7. State the reason for the call and provide any necessary information
8. Ask for information not volunteered
9. Listen closely
10. Apologize for the error if wrong number is reached

    (Note: Hang up, look up the number, and dial the call again.)

11. Close the conversation when finished with the call
12. Take time to thank the person called or make a pleasant closing remark
13. Replace the receiver quietly when the call is finished

    (Note: Remember that the caller has the responsibility of ending the call.)

VIII. Correct procedures for answering and handling a business call

A. Answer promptly

(Note: When you must be away from your desk, arrange to have someone answer the phone.)

B. Identify firm and yourself

C. Take necessary action

1. Calling others to the phone

   (Example: "If you will wait a moment, I will call Mr. Jones to the telephone." or "Yes, he is in. Just a moment and I will call him."

2. Asking caller to wait

(Example: "Mr. Adams is talking on another telephone. May I help you?" or "I'm sorry, Mr. Smith is unable to talk just now. Do you wish to wait or may he call you?"

3. Offering to be of help

   (Example: "Mrs. Thompson is out of the office until Thursday. May I help you?" or "Mr. Moore is expected back at 2 o'clock. May I ask him to call?" or "Mr. Clark is on vacation. His assistant, Mr. Christensen, is here. Would you like to talk with him?"

4. Taking a message

   (Example: "I'm sorry, Mr. Harris is out of the office today. May I take a message?"

   a. Have necessary materials at hand: pad, pencil, calendar

   b. Make notes as information is being given

   c. Write legibly

   d. Ask politely to have information repeated if necessary

   e. Verify information to be sure you have correct spelling, telephone numbers, dates, figures, etc.

5. Interrupting and reestablishing the call

   (Example: "I have the information in the file. Will you excuse me while I get it?"

   a. Attract attention when resuming call

      (Example: "Mr. Walker, thank you for waiting..."

   b. Express regret for interruption

   c. Offer choice of waiting or being called back

   d. Depress Hold Button during interruption if the telephone is equipped with one

   e. Return to the line every 30 or 40 seconds to let the caller know you are making progress during the interruption

6. Transferring a call

   (Example: "I'm sorry;, I do not have that information. Mr. Perkins at Extension 456 can answer your question. May I transfer your call?")

   a. When to transfer

      1) When caller has reached wrong extention

      2) When caller's request can be handled better by another person

      3) When caller wishes to speak to someone else

   b. How to transfer a call

      1) Tell the caller you will transfer call

      2) Be sure to transfer the call to the right person

      3) Know the correct extension

      4) Tell the person calling the name of the person called and the extension number, for future use

      5) Signal the PBX operator by slowly pressing and releasing the plunger

      6) Ask the operator to transfer the call to the needed extension

      7) Be sure the operator understands your request, then quietly hang up the receiver

         (Note: Many phones are equipped to transfer calls from each extension. The procedures are usually easy and should be included when introduced to you new job.)

IX. Purposes of the telephone directory

- A. To provide lists of those who have telephones, their telephone numbers, and addresses
- B. To help locate certain types of businesses
- C. To provide useful information about the city or area
- D. To serve as a source for checking the spelling of names
- E. To show how to call the telephone services

X. Organization of the telephone directory

- A. Introductory pages
    - 1. How to call in emergency situations (fire, police, ambulance)
    - 2. Areas served by the directory
    - 3. Dialing instructions
    - 4. Area codes
    - 5. How to place service calls
        - a. Repair service
        - b. Assistance on calls
        - c. Information operator
    - 6. How to obtain weather and time reports (when provided by the telephone company)
    - 7. When reduced rates for out-of-town calls are in effect
    - 8. How to send telegrams by telephone
    - 9. How to make overseas calls
    - 10. Equipment and services available
- B. Alphabetical pages
    - 1. Listings of individuals arranged by surname

(Note: Business firms containing the name of an individual are usually alphabetized by the surname.)

(Example: Manning Bowman
Mendel Allen
Muskie Edward)

2. Listings with same surname arranged alphabetically

   a. First by initials

   b. Followed by given names beginning with same letter

      (Example: Hansen D
      Hansen D. E.
      Hansen Donald)

3. Listings with identical names arranged according to street name

   a. First streets with names listed alphabetically

   b. Followed by numbered streets arranged in numerical order

      (Example: Clifton John C. 302 Elm Dr.
      Clifton John C. 1045 Garnet
      Cliston John C. 75 Marriot Lane)

4. Reference listings

   a. To show different spellings or names pronounced similarly

      (Example: Schmidt--See also Schmitt, Schmedt, Schmitz)

   B. To show a business listed under different names

      (Example: Evans Construction Company--See Troup and Evans Construction Company)

5. Indented listings

a. To show numbers associated with a business

(Example: Katz Dept. Store 707 Main
For information ----372-4507
To order------------372-8103)

b. To show numbers to be called after regular business hours

(Example: Dr. James Lea-------377-0412
If no ans. call--377-1437)

C. Uses of Yellow Pages

1. As a source of reference

a. A business may be found under its classification

b. A business may be located under its classification even though only the address or part of the name is known; distributors of brand name products may be located under the trademark heading

c. More information may be found in advertisements which are placed among listings

2. Arrangement of listings

a. Businesses appear under the classification which best describes each

b. Headings are arranged alphabetically

c. Most businesses are listed in both the yellow pages and the alphabetical pages

d. Cross references provide other headings under which listings may be located

e. Trademark headings list distributors and and dealers under specific brand name products

XI. Types of telephone equipment

A. Telephone switchboard (PBX)--Designed to control flow of telephone communications within a business

   1. Cord PBX (used by large firms)
   2. Cordless (for less than 50 telephones)

B. Push-button--A phone with as many as 5 lines
   1. Has HOLD button
   2. May have a special feature of a speaker inside the telephone to give "hands free" communication within normal voice range

C. Automatic Dial Phone
   1. Numbers frequently called
   2. Uses small plastic cards

D. Magnetic Tape Dialer
   1. Automatic dialer
   2. Six-key button phone
   3. Stores up to 500 telephone numbers

E. Automatic Transmitter Phone--makes it possible for 2 machines to transfer information to each other over the phone

F. Mobile telephone service--permits driver to talk to a regular phone and/or a mobile unit (plane, train, car, bus, ambulance)

G. Videophone
   1. This phone is available in only a few cities
   2. Enables people to have face-to-face conversations

UNIT V

TELEPHONE COMMUNICATIONS

ASSIGNMENT SHEET #1--ROLE-PLAYING SITUATIONS FOR TELEPHONE USAGE

Directions: Choose any 2 of the following situations to role-play on teletrainer before the class, showing correct procedures and proper telephone usage.

1. Boss is talking on another phone; take necessary action
2. Boss is out of town; take necessary action
3. Boss is out of office for the day; take a message
4. Necessary information is on file; take necessary action
5. Caller has reached the wrong department; transfer the call
6. Boss needs plane reservations for a conference in Washington, D. C. on Thursday; plan and place the call

(Note: Use the evaluation checklist on the following pages for each situation.)

EVALUATION CHECKLIST FOR ROLE-PLAY SITUATIONS

			YES	NO
Situation 1:	a.	Answered phone promptly		
	b.	Identified firm and self		
	c.	Gave caller a choice of waiting or being called back		
	d.	Offered help		
	e.	Used pleasant voice		
	f.	Was courteous		
Situation 2:	a.	Answered phone promptly		
	b.	Identified firm and self		
	c.	Said when boss might be reached		
	d.	Offered to help or referred calls to another person who could be of help		
	e.	Used pleasant voice		
	f.	Was courteous		
Situation 3:	a.	Answered phone promptly		
	b.	Identified firm and self		
	c.	Explained situation to caller		
	d.	Offered to take a message		
	e.	Had necessary materials at hand: pad, pencil, calendar		
	f.	Made notes as information was being given		
	g.	Wrote legibly		
	h.	Politely asked caller to repeat information not clearly understood		

			YES	NO
	i.	Verified accuracy of spelling, phone numbers, dates, and figures given by caller		
	j.	Used pleasant voice		
	k.	Was courteous		
Situation 4:	a.	Answered phone promptly		
	b.	Identified firm and self		
	c.	Explained situation		
	d.	Gave caller choice of waiting or being called back		
	e.	Pressed down Hold Button during interruption		
	f.	Resumed call politely		
	g.	Expressed regret for interruption		
	h.	Used pleasant voice		
	i.	Was courteous		
Situation 5:	a.	Answered phone promptly		
	b.	Identified firm and self		
	c.	Explained situation		
	d.	Explained that call would be transferred		
	e.	Stated the correct person's name and extension number		
	f.	Signaled PBX operator by depressing plunger slowly twice		
	g.	Asked operator to transfer call to desired extension		
	h.	Hung up quietly after operator took request		

	YES	NO
Situation 6: a. Planned the call correctly		
1. Wrote down all necessary information		
(a) Purpose of call		
(b) Name and number of airline to be reached		
(c) Approximate time of flight desired		
(d) Questions on cost and times of flight		
(e) Checked time zone differences in Washington, D.C.		
2. Had necessary materials		
(a) Pad and pencil		
(b) Calendar		
(c) Conference schedule		
(d) Notes with needed information		
3. Determined best time to call		
4. Located nearest airport to determine type of call to be made (local or long distance)		
b. Dialed call correctly		
1. Listened for dial tone before dialing		
2. Used index finger to dial		
3. Let dial return to its normal position by itself		
4. Dialed correct numbers		
c. Talked correctly		

		YES	NO
1.	Spoke directly into mouthpiece		
2.	Used normal tone		
3.	Spoke distinctly and clearly		
4.	Spoke at normal rate		
5.	Asked for proper extension		
6.	Identified self and company when correct extension was reached		
7.	Stated reason for call and provided necessary information		
8.	Asked tactfully for information not given; made necessary arrangements		
9.	Thanked other party for help		
10.	Pleasantly closed conversation; hung up quietly		

Rating:

If you did not answer "Yes" to each question above, your telephone communications are not up to business standards.

UNIT V

TELEPHONE COMMUNICATIONS

ASSIGNMENT SHEET #2--USE THE TELEPHONE DIRECTORY

Directions: Using the local telephone directory, locate and list the correct number or information for each item below.

1. Police____________________________

2. Directory Assistance (local)__________________________

3. List the hours long distance rates are lowest if you direct dial____________________________________

4. List the area code for any 5 of the following cities

   a. Los Angeles, California _______

   b. Denver, Colorado _________

   c. New Orleans, Louisiana________

   d. Syracuse, New York_________

   e. Duluth, Minnesota___________

   f. Columbus, Ohio_____________

   g. Austin, Texas _________

   h. Spokane, Wisconsin _________

   i. Madison, Wisconsin__________

   j. Gary, Indiana _________

5. List the name and number (or numbers) of the first indented reference in the alphabetical pages __________

6. List the name and number of one business [illegible]hat is listed under both the yellow pages and t[illegible] alphabetical pages ____

7. List the name and number of one busine[illegible] found under any 5 of the classifications listed on [illegible]he next page

a. Architects ____________________

b. Automobile Parts and Supplies (new or used) ____________________

c. Beauty Salons ____________________

d. Building Contractors ____________________

e. Doughnuts ____________________

f. Farm Equipment ____________________

g. Office Supplies ____________________

h. Oil Marketers ____________________

i. Optometrists ____________________

j. Restaurants ____________________

8. List the telephone numbers for any three of the following located in your community.

a. A hospital or health clinic ____________________

b. A high school ____________________

c. Dog pound ____________________

d. Public Works Department ____________________

e. FBI (Use nearest location if not in local community.) ____________________

UNIT V

TELEPHONE COMMUNICATIONS

UNIT TEST

1. Define the following terms
    a. Classifications--
    b. Trademark headings--
    c. Cross references--
    d. Area code--
    e. Converse--
    f. Telephone personality--
2. List three qualities of a good telephone personality
    a.
    b.
    c.
3. Circle the letter in front of each item below that add to the success of business calls
    a. Using person's name as little as possible

b. Using louder than normal conversational tone

c. Changing tone quality

d. Speaking more slowly than normal

e. Asking appropriate questions

f. Using short, simple, descriptive words

g. Using slang expressions

h. Using expressions of courtesy

4. List at least five ways telephone courtesy is expressed

a.

b.

c.

d.

e.

5. Name three basic purposes of most business calls

a.

b.

c.

6. Place a "✓" in the blank preceding each item that is an example of a correct procedure for planning and placing a business call

_____a. Make notes on points to be covered

_____b. Get a calendar to refer to during the call

_____c. Get a shorthand notebook to refer to during the call

_____d. Do not pay attention to differences in time zones for long distance calls

_____e. Use the letter "l" for the numeral "one" or the letter "O" for the numeral "zero" _____f. Hold the transmitter or mouthpiece away from the mouth

_____g. Asking if needed for information not volunteered

_____h. Hang up immediately if you reach a wrong number

_____i. Tactfully closing the conversation

7. Place a "✓" in the blank preceding each item that is an example of a correct procedure for answering and handling a business call

_____a. Transfer the call when caller's request can be handled better by another person

_____b. Signal the PBX operator to transfer a call by depressing the plunger several times rapidly

_____c. Request caller's permission before transferring a call

_____d. Offer caller a choice of waiting or being called back if interrupted

_____e. Leave the line open during an interruption

_____f. Take mental notes of messages being given

_____g. Ask politely to have information repeated if you are not certain that it has been correctly understood

_____h. Offer to assist if person being called is not available

8. List at least three purposes of the telephone directory

a.

b.

c.

9. Below are listed the organization headings of the telephone directory. Give examples of the types of information found under the three main sections of the directory

a. Introductory pages--

b. Alphabetical pages--

c. Yellow pages--

10. Name at least four types of telephone equipment in use

    a.

    b.

    c.

    d.

11. Demonstrate the ability to:

    a. Role-play proper use of the telephone in a given situation

    b. Use the telephone directory to find given information

    (Note: If the above activities have not been completed prior to the test, ask the instructor when they should be completed.)

UNIT V

TELEPHONE COMMUNICATIONS

ANSWERS TO TEST

1. a. Classifications--The headings in the yellow pages which list types of firms and businesses (e.g. doctors, lawyers, car garage, etc.)

   b. Trademark headings--The titles that list dealers and firms under brand names

   c. Cross references--Titles that show where a listing may be found

   d. Area code--A three-digit number which reaches a section of the country being called

   e. Converse--To talk with a person

   f. Telephone personality--The image of a person over the telephone

2. The answer can include any of the following

   a. pleasant, b. friendly c. interest

   d. sincerity e. helpful f. natural

3. a.
   b.
   c.
   d.
   e.
   f.
   g.
   h.

4. The answer can include any of the following:

   a. Answer the call pleasantly and promptly

   b. Use proper identification

   c. Give the purpose of the call clearly

   d. Ask questions clearly

   e. Give assistance and offer information

f. Use phrases such as "please" and "thank you"

g. Give complete attention to the conversation

h. Avoid long conversations except when necessary

i. End the call properly and replace the receiver gently

j. Allow a short time between calls if you must place several calls

5. a. To give information or directions

b. To get information or directions

c. To ask someone to do something

6. ✓ a

✓ b

✓ c

_____ d

_____ e

_____ f

✓ g

_____ h

✓ i

7. ✓ a

_____ b

✓ c

✓ d

✓ e

_____ f

✓ g

✓ h

8. The answer may include any of the following

a. To provide lists of those who have telephones, their numbers, and addresses

b. To help locate certain types of businesses

c. To provide useful information about the city or area

- d. To serve as a source for checking the spelling of names
- e. To show how to use telephone services

9. a. Introductory pages--area codes, service calls, etc.
   - b. Alphabetical pages--listing of individuals
   - c. Yellow pages--locate businesses, advertisements, etc.

10. The answer may include any of the following:
    - a. Telephone switchboard
    - b. Push-button
    - c. Automatic Dial Phone
    - d. Phone with speaker built inside
    - e. Magnetic Tape Dialer
    - f. Automatic Transmitter Phone
    - g. Mobile telephone service
    - h. Videophone

11. Demonstrate the ability to:
    - a. Role-play proper use of the telephone
    - b. Use the telephone directory to find given information

      (Note: If the above activities have not been completed prior to the test ask the instructor when they should be completed.)

UNIT VI

COMPUTING ROUTINE MATH TRANSACTIONS

UNIT OBJECTIVE

After completing this unit, the student should be able to add, subtract, multiply, and divide whole numbers, numbers containing decimals, and fractional numbers. The student also will be able to compute percentages and round off numbers. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student should be able to

1. Match the terms with their definitions.
2. Identify true statements about adding, subtracting, multiplying, and dividing whole numbers.
3. Point out rules on adding, subtracting, multiplying, and dividing numbers containing decimals.
4. Identify differences in the rules pertaining to adding, subtracting, multiplying, and dividing fractional numbers.
5. Apply practical shortcut methods in addition, subtraction, multiplication, and division.
6. Write the three types of percentage formulas.
7. Explain how to round off numbers.
8. Demonstrate the ability to:
    a. Add, subtract, multiply, and divide whole numbers, numbers containing decimals, and fractional numbers.
    b. Apply practical shortcuts in addition, subtraction, multiplication, and division.
    c. Compute percentages
    d. Round off numbers

UNIT VI

COMPUTING ROUTINE MATH TRANSACTIONS

SUGGESTED ACTIVITIES

I. Instructor:

  A. Give students pretest.

  B. Provide objectives sheet.

  C. Discuss objectives sheet.

  D. Provide information sheet.

  E. Discuss information sheet.

  F. Discuss and demonstrate proper proceudre for computing:

    1. whole numbers

    2. decimals and fractions

    3. decimals and equivalents

    4. percentages

    5. rounding off numbers

  G. Provide assignment sheets.

  H. Discuss assignment sheets.

  I. Give post test and evaluate results.

II. Student:

  A. Complete pretest.

  B. Read objectives sheet.

  C. Participate in discussion of objectives sheet.

  D. Read information sheet.

  E. Participate in discussion of information sheet.

F. Participate in discussion and demonstration of proper procedure for computing:

   1. whole numbers
   2. decimals and fractions
   3. decimals and equivalents
   4. percentages
   5. rounding off numbers

G. Read assignment sheets.

H. Complete assignment sheets.

I. Complete post test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objectives
   B. Information sheet
   C. Assignment sheets
      1. Assignment Sheet #1--Routine Math Using Whole Numbers
      2. Assignment Sheet #2--Routine Math Using Numbers Containing Decimals
      3. Assignment Sheet #3--Routine Math Relating to Numbers Containing Fractions
      4. Assignment Sheet #4--Mathematical Shortcuts
      5. Assignment Sheet #5--Computing Percentages
      6. Assignment Sheet #6--Exercise in Rounding Off Numbers
   D. Answers to assignment sheets
   E. Test
   F. Answers to test

II. References: Books

A. *Basic Skills - One The Job*. New York: CEBCO Standard Publishing Company, 1974.

B. Gossage, Loyce C. and Milton Briggs. *Mathematics Skill Builder*. 3rd ed. Cincinnati, Ohio: South-Western Publishing Co., 1969.

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F. Shea, James T. *Working With Numbers*. Austin: Steck-Vaughn Company, 1973.

UNIT VI

COMPUTING ROUTINE MATH TRANSACTIONS

INFORMATION SHEET

I. Terms and definitions

A. Addition--Putting two or more numbers together to find a total

1. Addend--A number to be added to another

2. Sum (total)--The answer by adding

B. Subtraction--Taking one number from another to obtain a remainder (or the difference)

1. Minuend--Top number when subtracting

2. Subtrahend--Bottom number when subtracting

3. Difference (remainder)--Answer when subtracting

C. Multiplication--Adding a number to itself a certain number of times

1. Multiplicand--Top number when multiplying

2. Multiplier--Bottom number when multiplying

3. Product--Answer when multiplying

D. Division--Putting one whole number into another

1. Dividend--Number to be divided

2. Divisor--Number that does the dividing

3. Quotient--The answer as a result of dividing

E. Fraction--A part of a whole number

1. Numerator--The top number of a fraction

2. Denominator--The bottom number of a fraction

F. Improper fraction--The numerator is as large or larger than the denominator

G. Mixed number--A number composed of a whole number and a fraction, such as $2\frac{1}{2}$

H. Complex fraction--A number having a fraction or a mixed number for its numerator, or denominator, or both, such as $\frac{5\frac{1}{4}}{6}$ or $\frac{6}{5\frac{1}{4}}$

II. Whole numbers

A. The place in which a figure appears in a whole number shows its value.

Example: 5,768

Thousands (1000)	Hundreds (100)	Tens (10)	Ones (1)
5	7	6	8

B. Addition of whole numbers--combine whole numbers so as to get a total

Examples:

$$\begin{array}{r} 4 \\ +\ 5 \\ \hline 9 \end{array} \qquad \begin{array}{r} 10 \\ +\ 15 \\ \hline 25 \end{array} \qquad \begin{array}{r} 117 \\ +\ 239 \\ \hline 356 \end{array}$$

C. Subtraction of whole numbers--take a whole number from another whole number

Examples:

$$\begin{array}{r} 5 \\ -\ 4 \\ \hline 1 \end{array} \qquad \begin{array}{r} 15 \\ -\ 10 \\ \hline 5 \end{array} \qquad \begin{array}{r} 239 \\ -\ 117 \\ \hline 122 \end{array}$$

D. Multiplication of whole numbers--adding a whole number to itself a certain number of times

Examples:

$$\begin{array}{r} 5 \\ \times\ 4 \\ \hline 20 \end{array} \qquad \begin{array}{r} 15 \\ \times\ 10 \\ \hline 150 \end{array} \qquad \begin{array}{r} 239 \\ \times\ 117 \\ \hline 1673 \\ 239 \\ 239 \\ \hline 27963 \end{array}$$

E. Division of whole numbers--arrange one whole number in another whole number

Examples

$$\begin{array}{r} 1 \\ 5\overline{)5} \\ \underline{5} \end{array} \qquad \begin{array}{r} 2 \\ 10\overline{)20} \\ \underline{20} \end{array} \qquad \begin{array}{r} 3 \\ 100\overline{)300} \\ \underline{300} \end{array}$$

III. Numbers containing decimals

A. Keep each digit in its own column, using the decimal as a guide.

Example: $1,534.21

Thousands (1000)	Hundreds (100)	Tens (10)	Ones (1)	Tenths (1/10)	Hundredths (1/100)
1	5	3	4	. 2	1

B. Addition of numbers with decimals--combine numbers with decimals to get one total

Examples:

$$\begin{array}{r} 5.5 \\ +\ 4.1 \\ \hline 9.6 \end{array} \qquad \begin{array}{r} 10.7 \\ +\ 11.1 \\ \hline 21.8 \end{array} \qquad \begin{array}{r} 191.1 \\ +\ 311.1 \\ \hline 502.2 \end{array}$$

C. Subtraction of numbers with decimals--add additional zeros for subtraction of decimals if necessary.

Examples:

$$\begin{array}{r} 4.5 \\ -\ 3.20 \\ \hline \end{array} = \begin{array}{r} 4.50 \\ -\ 3.20 \\ \hline 1.30 \end{array} \qquad \begin{array}{r} 4.9 \\ -\ 3.75 \\ \hline \end{array} = \begin{array}{r} 4.90 \\ -3.75 \\ \hline 1.15 \end{array}$$

$$\begin{array}{r} 6. \\ -\ 3.1 \\ \hline \end{array} = \begin{array}{r} 6.0 \\ -\ 3.1 \\ \hline 2.9 \end{array}$$

D. Multiplication of numbers with decimals--add the decimals in both numbers above the line to get the number of decimal places in the answer

Examples:

$$\begin{array}{r} 4.5 \\ \times\ 2.3 \\ \hline 13\ 5 \\ 90\ \ \\ \hline 10.35 \end{array} \qquad \begin{array}{r} 1.04 \\ \times\quad .2 \\ \hline .208 \end{array} \qquad \begin{array}{r} .004 \\ \times\ \ .75 \\ \hline 20 \\ 28\ \\ \hline .00300 \end{array}$$

E. Division of numbers with decimals

1. Move the decimal point in the divisor enough places to the right to make it a whole number — .25.-two places

2. Move the decimal point in the dividend the same number of places, adding zeros if necessary — .25.)125.25. two places

3. Place the decimal point for the quotient directly above the new position of the decimal point in the dividend

```
     .
.25)125.25.
```

Examples: 125.25 ÷ .25   6.9 ÷ .03

```
         501.             230.
  /25.)125/25.      /03.)6/90.
       125               6
         25               9
         25               9
                           0
                           0
```

IV. Fractional numbers:

A. Addition and subtraction of common fractions:

1. Only things of like denomination should be added or subtracted.

2. If different, must be changed to equivalent fraction with a common denominator.

    a. To change a fraction to a higher denomination, multiply the denominator of the given fraction by the number that will give the desired denominator.

    b. Multiply the numerator of the fraction by the same multiplier.

    Example: 1/2 to fourths

    step a. 2 x 2 = 4

    step b. 1 x 2 = 2

    Result: $\frac{1}{2} = \frac{2}{4}$

    c. To change a fraction to a lower denomination, proceed in like manner, but divide, instead of multiplying both the denominator and the numerator by the same number.

Example: $\frac{2}{4}$ to halves

step c. $4 \div 2 = 2$

$2 \div 2 = 1$

Result: $\frac{2}{4} = \frac{1}{2}$

B. Addition and subtraction of mixed numbers and improper fractions

1. Common denominators are still necessary when adding and subtracting mixed numbers and improper fractions.

2. Mixed numbers must be changed to improper fractions.

   a. To change a mixed number to an improper fraction, multiply the whole number part of the mixed number by the denominator of the fractional part, and to this result add the numerator of the fractional part. This number is the numerator of the improper fraction.

   b. To change an improper fraction to a mixed number, divide the numerator by the denominator.

Examples: step a. $1\frac{2}{6}$

$1 = \frac{6}{6}$

$\frac{6}{6} + \frac{2}{6} = \frac{8}{6}$

Result: $\frac{8}{6}$

step b. $\frac{7}{5}$

$$\begin{array}{r} 1 \\ 5\overline{)7} \\ \underline{5} \\ 2 \end{array}$$

Result: $1\frac{2}{5}$

3. When mixed numbers are to be added, add the fractional parts of the addends and to this sum add the whole number portions of the addends.

Example: $1\,\frac{1}{2}$ $\qquad$ $\frac{1}{2}\;\;\frac{4}{8}$ thus $\frac{4}{8} + \frac{2}{8} = \frac{6}{8}$

$$\begin{array}{r} 1\,\frac{1}{2} \\ +\ 2\,\frac{2}{8} \\ \hline 3\,\frac{6}{8} \end{array} \text{ or } 3\,\frac{3}{4}$$

4. When mixed numbers are to be subtracted:

   a. Change each mixed number to an improper fraction

   b. Convert the improper fractions to equivalent fractions with common denominators

   c. Subtract the numerators

   d. Place the difference over the common denominator and reduce to lowest terms or a mixed number

   Example:

$$\begin{array}{r} 5\,\frac{7}{8} \\ -\ 4\,\frac{3}{4} \\ \hline \end{array}$$

   step a. $\frac{47}{8} - \frac{19}{4}$

   step b. $\frac{47}{8} - \frac{38}{8}$

   step c. $47 - 38 = 9$

   step d. $\frac{9}{8}$ or $1\frac{1}{8}$

C. Multiplication of fractions

1. To multiply common fractions, multiply the numerators by the numerators and the denominators by the denominators and reduce the product to its lowest terms.

Example: $\frac{3}{5} \times \frac{1}{3} = \frac{3}{15} = \frac{1}{5}$

2. To multiply a whole number by a fraction, simply multiply the whole number by the numerator and divide by the denominator.

Example: $7 \times \frac{1}{6}$

$$7 \times 1 = 7$$

$$\begin{array}{r|l} & 1\,\frac{1}{6} \\ \hline 6) & 7 \\ & \underline{6} \\ & 1 \end{array}$$

3. When multiplying a whole number by a mixed number, multiply first by the fraction and then by the whole number.

Example:

$$\begin{array}{r l} 47 & \\ \times\ 23\,\frac{1}{3} & \\ \hline 15\,\frac{2}{3} & (47 \times \frac{1}{3}) \\ 141\phantom{\,\frac{1}{3}} & \\ 94\phantom{0\,\frac{1}{3}} & \\ \hline 1096\,\frac{2}{3} & \end{array}$$

4. To multiply a mixed number by a whole, multiply first by the fraction of the multiplier and then multiply the whole numbers.

Example:

$$\begin{array}{r l} 124\,\frac{1}{8} & \\ \times\ 35\phantom{\,\frac{1}{8}} & \\ \hline 4\,\frac{3}{8} & (35 \times \frac{1}{8}) \\ 620\phantom{\,\frac{1}{8}} & \\ 372\phantom{0\,\frac{1}{8}} & \\ \hline 4344\,\frac{3}{8} & \end{array}$$

5. The multiplication of a mixed number by a mixed number may be done in one of two ways:

   a. Convert the mixed numbers to improper fractions and multiply numerators and denominators and reduce results to lowest terms.

   b. Multiply separately the fraction and whole number in the multiplicand by the fraction and whole number in the multiplier.

$$\begin{array}{rl} 35\ \frac{1}{4} & \\ \times\quad 9\ \frac{2}{3} & \\ \hline \frac{2}{12} & (\frac{2}{3} \times \frac{1}{4}) \\ 23\ \frac{1}{3} & (\frac{2}{3} \times 35) \\ 2\ \frac{1}{4} & (9 \times \frac{1}{4}) \\ 315 & (9 \times 35) \\ \hline 340\ \frac{3}{4} & \end{array}$$

D. Division of fractions

1. If either the divisor or the dividend is a fraction, invert the divisor and multiply the dividend by this new number.

   Example: $\frac{1}{2} \div \frac{1}{3}$

   $\frac{1}{2} \times \frac{3}{1} = \frac{3}{2} = 1\ \frac{1}{2}$

2. Change each mixed number to an improper fraction and then proceed as explained in example above.

V. Practical shortcuts

A. Develop speed in addition by adding groups of two or more numbers to equal 10.

Example:

$$\begin{array}{lll} 6 & & \\ 4 & > 10 & \\ & & \\ 3 & > 10 & \\ 7 & & = 30 \\ & & \\ 2 & & \\ 4 & > 10 & \\ 4 & & \end{array}$$

B. In multiplying by 10, 100, 1000, etc., move the decimal place in the multiplicand to the right as many places as there are zeros in the multiplier.

Example: 25. x 10 = 250

300. x 100 = 30000

C. To divide by 10, 100, 1000, etc., move the decimal point in the dividend as many places to the left as there are zeros in the divisor.

Example: 2500. ÷ 100 = 25.

25. ÷ 1000 = .025

D. Dividing by 25 or by a multiple of 25

1. To divide by 25, first divide by 100 and multiply results by 4 because dividing by 25 gives you a quotient 4 times larger than dividing by 100.

2. To divide by 50, first divide by 100 and multiply the results by 2.

3. To divide by 75, first divide by 100, then multiply the quotient by 4 and divide the results by 3.

Examples: step 1. 900 ÷ 100 = 9.00

9 x 4 = 36

step 2. 2310 ÷ 100 = 23.10

23.10 x 2 = 46.20

step 3. 589 ÷ 100 = 5.89

5.89 x 4 = 23.56

23.56 ÷ 3 = 7.853

VI. Percents and percentages

A. Shows a relationship between two numbers

B. Three factors are involved in a percentage relationship

1. Base--The number on which the percent is calculated or the whole amount

2. Rate--% or the number of hundreds taken

3. Percentage--The number found by multiplying the base by the rate

C. In working percentage problems, the % must be changed to a decimal fraction by removing the percent sign and moving the decimal point two places to the left

90% = .90

1.5% = .015

In changing a decimal fraction to percent, move the decimal point two places to the right and add a percent (%) sign.

D. Three types of percentage problems:

1. Finding a certain percent of a number

Formula: Percentage = Rate x Base

Example: Find 15% of $5.00

.15 x 5.00 = $.75

2. Finding what percent one number is of another

Formula: $\text{Rate} = \frac{\text{Percentage}}{\text{Base}}$

Example: 150 is what % of 1250?

150 ÷ 1250 = .12 or 12%

3. Finding the whole number when a percent of it is known

Formula: $\text{Base} = \frac{\text{Percentage}}{\text{Rate}}$

Example: 105 is 15% of what number?

105 ÷ .15 = 700

VII. Rounding off numbers

A. To round off any number to a specific place, select the desired place (as nearest thousand or nearest million) and omit all numerals to the right of that place substituting zeros.

B. The rule for rounding is: raise the main digit (the digit you are rounding) by 1 if the digit to the right of it is between five and nine. Do not change it if the digit to the right of it is between 0 and 4.

UNIT VI

COMPUTING ROUTINE MATH TRANSACTIONS

ASSIGNMENT SHEET #1--ROUTINE MATH USING WHOLE NUMBERS

Directions: Complete the following problems relating to whole numbers.

I. Add:

1.	2.	3.	4.	5.	6.
8	12	134	1,200	48	168
4	16	122	4,300	56	148
	13	346	5,198	39	263
				24	192
				52	631

7. 3 + 6 + 8 + 10 =

8. 58 + 64 + 32 + 40 =

II. Subtract:

1.	2.	3.	4.	5.	6.
9	87	94	312	1,362	632
3	63	24	197	976	396

7. 48 - 26 =

8. 189 - 76 =

III. Multiply:

1. 36 x 5 =
2. 63 x 7 =
3. 96 x 12 =
4. 430 x 7 =
5. 364 x 28 =
6. 9,368 x 37 =
7. 8,674 x 8 =
8. 726 x 33 =

9.	10.
86	96
x 6	x 12

IV. **Divide**:

1. $7\overline{)364}$ 2. $14\overline{)868}$ 3. $5\overline{)2,062}$ 4. $3\overline{)2,493}$

5. $8\overline{)1,638}$ 6. $134\overline{)12,362}$ 7. $27\overline{)24,368}$

8. $6\overline{)8,346}$

UNIT VI

COMPUTING ROUTINE MATH TRANSACTIONS

ASSIGNMENT SHEET #2--ROUTINE MATH WITH NUMBERS CONTAINING DECIMALS

Directions: Complete the following problems relating to numbers containing decimals.

I. Add:

1. 6.75 3.86	2. 136.2 31.8	3. 328.25 18.06 1.3 6.0728 148.381	4. 1.5 + 17.28 + 1.7

4. 1.5 + 17.28 + 1.7 =

5. 18.50 + 3.75 + 2.8 =

II. Subtract:

1. 17.3693 - 9.146	2. 38.1 - 4.581	3. 28.036 - .89326

4. 4.92 - 3.964 =

5. 125 - 29.368 =

III. Multiply:

1. 46.024 x .017	2. .000284 x .436	3. .00636 x .00362

4. 48625
x .009

5. 25.50
x 1.75

IV. Divide:

1. $121\overline{)60.380}$

2. $2.8\overline{)4,380.10}$

3. $6.08\overline{)2,890}$

4. $.072\overline{)573.08}$

5. $76\overline{)138.8}$

UNIT VI

COMPUTING ROUTINE MATH TRANSACTIONS

ASSIGNMENT SHEET #3--ROUTINE MATH WITH NUMBERS CONTAINING FRACTIONS

Directions: Complete the following problems relating to numbers containing fractions.

I. Add:

1. $\frac{3}{7} + \frac{3}{7} =$

2. $\frac{1}{2} + \frac{1}{4} + \frac{5}{6} =$

3. $5\frac{5}{30} + 9\frac{5}{6} + 6\frac{1}{5} =$

4. $\frac{8}{3} + \frac{1}{6} + \frac{17}{12} =$

5. $\frac{3}{4} + \frac{2}{3} + \frac{6}{12} =$

6. $2\frac{1}{4} + 3\frac{3}{8} =$

7. $\frac{1}{4} + \frac{3}{4} + \frac{3}{12} =$

II. Subtract:

1. $\frac{5}{12} - \frac{1}{12} =$

2. $\frac{5}{6} - \frac{1}{4} - \frac{1}{2} =$

3. $\frac{3}{4} - \frac{1}{2} - \frac{1}{12} =$

4. $\begin{array}{r} 63\frac{1}{8} \\ -\ 6\frac{1}{2} \\ \hline \end{array}$ $\quad \begin{array}{r} 76 \\ -\ 43\frac{1}{4} \\ \hline \end{array}$ $\quad \begin{array}{r} 6\frac{11}{12} \\ -\ 4\frac{6}{12} \\ \hline \end{array}$ $\quad \begin{array}{r} 12\frac{12}{16} \\ -\ 5\frac{6}{8} \\ \hline \end{array}$

III. Multiply:

1. $\frac{2}{3} \times \frac{3}{5} =$
2. $6\frac{1}{4} \times 3\frac{3}{4} =$
3. $13 \times 4\frac{1}{2} =$
4. $8 \times 1\frac{3}{4} =$
5. $\frac{1}{3} \times \frac{2}{4} =$
6. $7\frac{3}{8} \times 13\frac{1}{2} =$
7. $\frac{1}{4} \times \frac{1}{4} =$
8. $\frac{2}{3} \times \frac{7}{8} \times \frac{2}{5} =$

IV. Divide:

1. $\frac{3}{5} \div \frac{8}{16} =$
2. $22\frac{1}{2} \div 1\frac{1}{2} =$
3. $7 \div \frac{1}{3} =$
4. $4 \div \frac{2}{3} =$
5. $120 \div 6\frac{1}{2} =$
6. $12\frac{1}{4} \div 2\frac{1}{4} =$
7. $\frac{5}{12} \div 4 =$

UNIT VI

COMPUTING ROUTINE MATH TRANSACTIONS

ASSIGNMENT SHEET #4--MATHEMATICAL SHORTCUTS

Directions: Complete the following problems relating to practical shortcuts.

I. Addition:

1. 9	2. 8	3. 7	4. 726	5. 164	6. 5,627
1	2	3	195	532	4,251
			234	534	1,943
					3,426
					5,942

II. Multiply:

1. 385 x 10 =
2. 180 x 1,000 =
3. 83 x 8,000 =
4. 364 x 100 =
5. 38.65 x 100 =
6. 436 x 600 =

III. Divide:

1. $10\overline{)3,863}$
2. $1000\overline{)12,483}$
3. 18,290 ÷ 50 =
4. $100\overline{)5,783}$
5. 4,480 ÷ 25 =
6. 9,740 ÷ 75 =

UNIT VI

COMPUTING ROUTINE MATH TRANSACTIONS

ASSIGNMENT SHEET #5--COMPUTING PERCENTAGE

Directions: Find the base, rate, or percentage in the following problems (Note: When necessary, carry answers two decimal places.)

1. 40% of $4.50 is ______________
2. 38% of $75.75 is ______________
3. .50 is ________% of 320
4. $55 is 35% of ____________
5. 12% of $188 is ____________
6. 3 is 15% of ______________
7. $255 is __________% of $1085
8. 21.12 is 8% of ____________
9. 1160 is __________% of 1450
10. 25% of $875 is ___________

UNIT VI

COMPUTING ROUTINE MATH TRANSACTIONS

ASSIGNMENT SHEET #6--EXERCISE IN ROUNDING OFF NUMBERS

Directions: Complete the following problems relating to rounding numbers.

Round each number to the places indicated:

1. 236 to nearest ten
2. 23,280 to nearest hundred
3. 932,660 to nearest thousand
4. 106,858 to nearest ten thousand
5. 583 to nearest ten
6. 873 to nearest hundred

UNIT VI

COMPUTING ROUTINE MATH TRANSACTIONS

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

I.
1. 12
2. 41
3. 602
4. 10698
5. 219
6. 1402
7. 27
8. 194

II.
1. 6
2. 24
3. 70
4. 115
5. 386
6. 236
7. 22
8. 113

III.
1. 180
2. 441
3. 1152
4. 3010
5. 10,192
6. 346,616
7. 69,392
8. 23,958
9. 516
10. 1152

IV.
1. 52
2. 62
3. 412.4
4. 831
5. 204.75
6. 92.25
7. 902.52
8. 1391

Assignment Sheet #2

I.
1. 10.61
2. 168.0
3. 502.0638
4. 20.48
5. 25.05

II.
1. 8.2233
2. 33.519
3. 27.14274
4. .956
5. 95.632

III.
1. .782408
2. .000123824
3. .000023
4. 437.625
5. 44.625

IV.
1. .4990082
2. 1564.3214
3. 475.32894
4. 7959.4444
5. 1.8263157

Assignment Sheet #3

I.	II.	III.	IV.
1. $\frac{6}{7}$	1. $\frac{1}{3}$	1. $\frac{3}{5}$	1. $1\frac{1}{5}$
2. $1\frac{7}{12}$	2. $\frac{1}{12}$	2. $23\frac{1}{4}$	2. 15
3. $21\frac{1}{5}$	3. $\frac{1}{6}$	3. $175\frac{1}{2}$	3. 21
4. $3\frac{7}{12}$	4. $56\frac{5}{8}$	4. 14	4. 6
5. $1\frac{11}{12}$	5. $32\frac{3}{4}$	5. $\frac{1}{6}$	5. 260
6. $5\frac{5}{8}$	6. $2\frac{5}{12}$	6. $129\frac{1}{6}$	6. $5\frac{4}{9}$
7. $1\frac{1}{4}$	7. 7	7. $\frac{1}{16}$	7. $\frac{5}{48}$
		8. $\frac{7}{30}$	

Assignment Sheet #4

I.	II.	III.
1. 10	1. 3,850	1. 386.3
2. 10	2. 180,000	2. 12.483
3. 10	3. 664,000	3. 9,145
4. 1155	4. 36,400	4. 57.83
5. 1220	5. 3865.	5. 179.20
6. 21189	6. 261,600	6. 282.20

Assignment Sheet #5

1. $1.80	3. 15.62%	5. $22.56	7. 23.5%	9. 80%
2. $66.79	4. $157.14	6. 20	8. 264	10. $218.75

Assignment Sheet #6

1. 240	4. 110,000
2. 23,300	5. 580
3. 933,000	6. 900

UNIT VI

COMPUTING ROUTINE MATH TRANSACTIONS

UNIT TEST

1. Match terms used in routine math with their purpose by:

   a. Placing the correct number of the function next to the term

   _____ addend

   _____ difference

   _____ sum

   _____ subtrahend

   _____ multiplicand

   _____ product

   _____ divisor

   _____ quotient

   _____ dividend

   _____ multiplier

   _____ denominator

   _____ mixed number

   _____ improper fraction

   _____ complex fraction

   _____ numerator

   _____ minuend

$$\begin{array}{r} 48 \\ +\ 24 \leftarrow 3 \\ \hline 72 \leftarrow 12 \end{array} \qquad \begin{array}{r} 48 \leftarrow 6 \\ -\ 24 \leftarrow 13 \\ \hline 24 \leftarrow 7 \end{array}$$

$$\begin{array}{r} 48 \leftarrow 4 \\ \times\ 24 \leftarrow 15 \\ \hline 1152 \leftarrow 16 \end{array} \qquad 11 \searrow \begin{array}{r} 2 \leftarrow 2 \\ 24\overline{)48} \nwarrow 10 \end{array}$$

$$\begin{array}{l} 24 \leftarrow 14 \\ \hline 48 \leftarrow 5 \end{array} \qquad \boxed{\frac{48}{24}} \leftarrow 1$$

$$7\,\frac{1}{4} \leftarrow 9 \qquad \boxed{\frac{7\frac{1}{4}}{5}} \leftarrow 8$$

   b. Placing the correct number next to the correct math process

   _____ addition

   _____ subtraction

$$\boxed{17\overline{)34}} \leftarrow 1 \qquad \boxed{\begin{array}{r} 34 \\ \times\ 17 \\ \hline \end{array}} \leftarrow 2$$

$$\boxed{\begin{array}{r} 34 \\ -\ 17 \\ \hline \end{array}} \leftarrow 3 \qquad \boxed{\begin{array}{r} 34 \\ +\ 17 \\ \hline \end{array}} \leftarrow 4$$

_____ multiplication

_____ division

2. Identify true statements pertaining to adding, subtracting, multiplying, and dividing whole numbers by circling "T" for true or "F" for false.

T F a. Subtraction is arranging one whole number among another whole number.

T F b. Multiplication of whole numbers is a process of adding.

T F c. Adding whole numbers means finding the sum.

T F d. Division of whole numbers takes away one whole number from another whole number.

T F e. The position of a figure in a whole number denotes that number's value.

3. Point out rules on adding, subtracting, multiplying, and dividing numbers containing decimals by placing a "✓" next to the correct statements.

_____a. Keep each digit in its own column.

_____b. When subtracting numbers with decimals, additional zeros are added if necessary.

_____c. When multiplying numbers with decimals, decimals in the multiplier are subtracted from the decimals in the multiplicand.

_____d. The decimal point is moved to the right when dividing numbers with decimals.

_____e. The decimal point is moved to the left when adding numbers with decimals.

4. Place a "✓" beside those statements that are true concerning fractions.

_____a. Only things of the same denomination should be added or subtracted.

_____b. Common denominators are not necessary when adding and subtracting mixed numbers and improper fractions.

_____c. When adding and subtracting mixed numbers, the mixed numbers are changed to improper fractions.

_____d. To multiply common fractions, multiply the numerators by numerators and denominators by denominators.

_____e. When dividing fractions, if either the divisor or dividend is a fraction, invert the divisor and then multiply it by the dividend.

5. Place TRUE beside those statements that are true concerning mathematical practical shortcuts.

_____a. When adding, total two or more numbers to equal 20.

_____b. If a problem calls for multiplying a number by 1000, the decimal in the multiplicand is moved to the right three spaces.

_____c. To divide by 100, the decimal point is moved to the left three places.

_____d. To divide by 50, first divide by 100 and multiply the result by 2.

_____e. To divide by 75, first divide by 100, multiply by 3 and divide by 4.

6. Write the three formulas used when working with percentages.

a.

b.

c.

7. Explain how to round off numbers.

8. Demonstrate the ability to:

   a. Add, subtract, multiply, and divide whole numbers, numbers containing decimals, and fractional numbers.

   b. Use practical shortcuts in addition, subtraction, multiplication, and division.

   c. Compute percentages.

   d. Round off numbers.

   (NOTE: If the skills have not been accomplished prior to the test, ask the instructor when they should be completed.)

UNIT VI

COMPUTING ROUTINE MATH TRANSACTIONS

ANSWERS TO UNIT TEST

1. a.

3	addend	10	dividend
7	difference	15	multiplier
12	sum	5	denominator
13	subtrahend	9	mixed number
4	multiplicand	1	improper fraction
16	product	8	complex fraction
11	divisor	14	numerator
2	quotient	6	minuend

b.

4	addition
3	subtraction
2	multiplication
1	division

2. a. F

b. T

c. T

d. F

e. F

3. ✓ a.

✓ b.

____ c.

✓ d.

____ e.

4. ✓ a.

______ b.

✓ c.

✓ d.

✓ e.

5. ______ a.

TRUE b.

______ c.

TRUE d.

______ e.

6. a. Percentage = Rate x Base

b. Rate = $\frac{\text{Percentage}}{\text{Base}}$

c. Base = $\frac{\text{Percentage}}{\text{Rate}}$

7. To round off any number to a specific place, select the desired place (as nearest thousand or nearest million) and omit all numerals to the right of that place substituting zeros. The rule of rounding is: raise the significant digit (the digit you are rounding) by 1 if the digit to the right of it is between 5 and 9 and do not change it if the digit to the right of it is between 0 and 4.

8. Evaluated to the satisfaction of the instructor.

UNIT VII

STENCIL DUPLICATION

UNIT OBJECTIVE

After completing this unit, the student should be able to identify terms relating to stencil duplication and their definitions, describe the stencil duplication process and procedures involved, and be able to type a stencil and operate a stencil duplicator. This knowledge will be evidenced through demonstration and by satisfactorily completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to:

1. Match terms relating to stencil duplication with their correct definitions
2. Briefly describe the stencil duplication process
3. List the four parts of a stencil pack
4. Identify the types of styli used in stencil duplication
5. Sequence the steps of typing a stencil in their proper order
6. Sequence in their proper order the steps in correcting a stencil
7. Give the procedures in operating a stencil duplicator
8. List causes of faulty reproduction
9. List the advantages and disadvantages of stencil duplicators
10. Demonstrate the ability to:
    a. Label parts of a stencil duplicator
    b. Use the stylus
    c. Type a stencil
    d. Operate a stencil duplicator

UNIT VII

STENCIL DUPLICATION

SUGGESTED ACTIVITIES

I. Instructor:

  A. Provide objective sheet

  B. Provide information and job sheets

  C. Make transparencies

  D. Discuss terminal and specific objectives

  E. Discuss information sheet

  F. Demonstrate and discuss procedures outlined on job sheets

  G. Give test and evaluate results

II. Student:

  A. Read objectives

  B. Study information sheet

  C. Demonstrate ability to accomplish procedures outlined on job sheets

  D. Take test

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Transparencies

    1. VII-TM-1--Stencil Duplicator

    2. VII-TM-2--Stencil Pack

    3. VII-TM-3--Types of Styli

4. VII-TM-4--Correcting Stencil

5. VII-TM-5--Stencil Guide Marks

D. Assignment sheets

1. Assignment Sheet #1--Parts of the Stencil Duplicator

2. Assignment Sheet #2--Using a Stylus

E. Job sheets

1. Job Sheet #1--Typing a Stencil

2. Job Sheet #2--Operating a Stencil Duplicator

F. Test

G. Answers to test

II. References:

A. Bauer, Dennis E. and John W. Strahl. Office Reproduction Processes. San Francisco: Canfield Press, 1975.

B. Fundamentals of Mimeographing. Chicago: A B Dick Company, 1967.

C. Meehan, James R., William R. Pasewark and Mary Ellen Oliverio. Clerical Office Procedures. 5th ed., Cincinnati: South-Western Publishing Co., 1973.

D. Pasewark, William R. Duplicating Machine Processes. 2nd ed. Cincinnati: South-Western Publishing Co., 1975.

UNIT VII

STENCIL DUPLICATION

INFORMATION SHEET

I. Terms and Definitions

  A. Stencil--Wax-coated tissue from which copies are reproduced

  B. Cushion sheet--Sheet between stencil sheet and backing sheet which cushions the typewriter keys to prevent tearing stencil sheet

  C. Backing sheet--Cardboard-like sheet behind the cushion sheet.

  D. Transparent film sheet--A piece of clear film put over stencil pack before type is put on the stencil

  E. Brake--A lock preventing the ink drum from being turned

  F. Horizontal adjustment--Control which straightens a copy on the stencil duplicator from side to side

  G. Copy counter--A dial showing the number of copies being reproduced

  H. Feed roll pressure--Adjustment on stencil duplicator which allows for different weights of paper

  I. Feed knob--Control which raises the paper to the feed rollers

  J. Lowering lever--Control which lowers feed table on the stencil duplicator

  K. Feed rollers--Wheel-like parts which draw the paper into the machine

  L. Feed lever--Control which drops feed rollers to paper as it is fed into the machine

  M. Guide rail--Device which holds the paper in the proper position on the feed table

  N. Guide rail knob--Control which moves guide rails to handle various sizes of paper

O. Head clamp--Device which holds stencil against ink drum

P. Hand wheel--Control which manually feeds paper through the stencil duplicator

Q. Ink measuring rod--Stick that shows the level of ink in the stencil duplicator

R. Lateral adjustment--Control which moves feed table to the left or right

S. Motor switch--Control which starts and stops motor-driven machines

T. Paper separator--Control which allows only one sheet of paper to be fed into the machine at one time

U. Receiving tray--A place that holds the reproduced copies

V. Stylus--A tool used to handwrite or trace designs on stencil sheet

W. Vertical adjustment knob--Raises or lowers copy on paper

II. Stencil Duplicating Process

A. The first stencil duplicator was developed in the United States during the late 1800s by Thomas Edison.

B. Interest in stencil duplicators became popular, and soon the machine became a basic piece of equipment for many businesses.

C. The stencil duplicating process simply involves preparing a stencil with either a typewriter or a stylus and running the stencil on the duplicator.

D. Reproduction occurs when ink flows through the impressions made on the stencil and comes in contact with the paper being fed through the machine.

III. The stencil Pack

A. The stencil pack is made up of the following:

1. Stencil sheet, has a special coating

2. Cushion sheet, prevents the stencil from tearing when typing occurs

3. Backing sheet, helps to hold the stencil pack

4. Transparent film sheet, helps to make the copy bolder

B. Stencil guide marks on the stencil sheet help position copy on the stencil sheet

1. A broken line on top of the stencil sheet indicates the space available for copy to be put on the stencil

2. Typewriter line spaces are shown along the side of the stencil

3. The side margins are indicated by limit lines which allow for 5/8 inch margin on each side of the stencil

4. Typewriter character scales are also located on the stencil sheet and help to show the amount of space for pica or elite typing

5. Broken lines show where to place postal cards for typing

IV. Types of styli

A. Wire-loop stylus--Best for ruling or drawing. Keep the thinnest part of the stylus parallel to the line being drawn.

B. Ball-point stylus--Used for detailed work. It is used as one would use a pen

C. Wheel stylus--Comes in several patterns. It is used for drawing solid and broken lines.

D. Roll-point stylus--Is used for writing, signing names, and freehand drawing. Firm pressure is applied when using this stylus, which is held almost straight up.

V. Typing a Stencil

A. Put ribbon control to the "stencil" position

B. Unless a transparent film sheet is being used, clean the typewriter keys.

C. Place the cushion sheet between the stencil sheet and the hard backing sheet, with the shiny side of the cushion sheet facing the stencil.

D. Place the stencil pack in the typewriter. The paper release lever is engaged, and the stencil pack is aligned. After the stencil is aligned, the paper release is locked.

E. On manual typewriters, be careful to type commas and periods with a soft stroke, and letters m and w with a firm stroke.

F. Proofread the typed stencil before removing it from the machine.

G. Any errors found in proofreading should be corrected by using stencil correction fluid. Remove the transparent film and brush the fluid over the error. After allowing the fluid to dry, type the correct letter. If a cushion sheet is used, the rounded end of a paper clip is used to rub the error so that some of the stencil coating is returned to the area to be corrected. This also helps to hold the correction fluid which is then placed over the area.

VI. Correcting the Stencil

A. Roll master up and remove the transparent film sheet

B. Using a smooth object (paper clip is o.k.), rub over the error very gently in a circular motion. This spreads the wax coating over the error.

C. Lift the stencil sheet out from the cushion or backing sheet and brush correction fluid over the error. Hold in this position until dry.

- D. Replace transparent film sheet, roll back to typing position, and type over the corrected error

VII. Machine Operation

- A. Release the brake by moving control to OFF
- B. Open end clamp and remove protective cover from drum
- C. Remove film sheet and place stencil pack on drum. Close head clamp and tear off backing sheeet
- D. Place copy paper on feed table and raise to within 1/2 inch of feed rollers
- E. On electric machines, turn power switch ON. On manual machines, a complete turn of the handle will begin feeding the paper
- F. Stop machine after 5 or 6 copies have been made and check how the printed copy looks
- G. Set the counter dial for the number copies to be made
- H. Remove stencil from the machine and put away
- I. Replace protective cover on drum and set brake in the ON position

VIII. Problems Associated with Stencil Duplication

- A. Poorly reproduced copy
  - 1. Causes--Low ink supply or uneven typewriter
  - 2. Remedies--Filling a low ink supply, or changing impression control on typewriter to medium setting
- B. Multiple sheet
  - 1. Causes--Copy sheet sticking together or feeding parts not working properly
  - 2. Remedies--Fan copy paper or check feeding mechanism

C. Skip feeding

1. Cause--Feeding mechanism is either dirty or not working properly

2. Remedies--Check, clean and/or replace feeder parts

D. Back side of copy smudged

1. Cause--Ink is on either the stencil, impression roller, or metal parts of drum

2. Remedy--Clean the ink off of stencil, impression roller, or metal parts of drum

E. Streaking and spots

1. Cause--Dirty feed rollers or ink leakage from the stencil

2. Remedies--Clean feed wheels and rollers or apply a light coat of stencil correction fluid over holes in stencil

F. Half size letters on copy

1. Cause--Wrinkles on stencil

2. Remedy--Rub the thumb across and down on the stencil

G. Copy too high or low

1. Cause--Wrong vertical alignment

2. Remedy--Move the vertical placement lever in the direction desired

H. Copy too far left or right of center

1. Cause--Wrong stencil centering

2. Remedy--Move guide rails on the feed tray to CENTER position

VIII. Advantages and Disadvantages of Stencil Duplication

A. Advantages

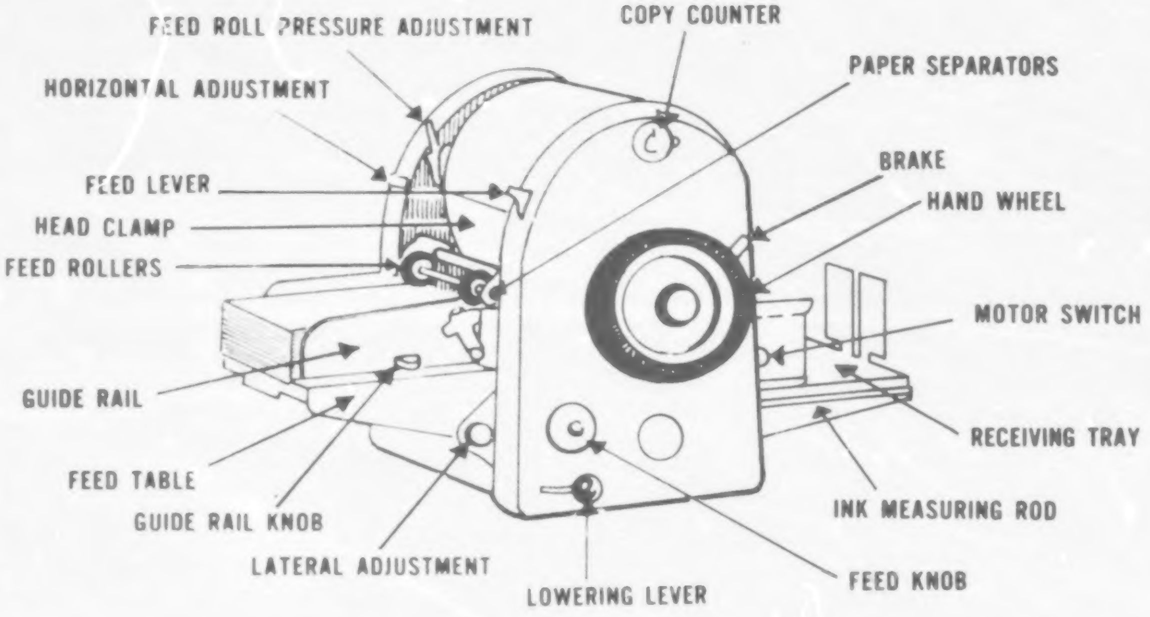
1. Equipment costs are low

2. Copies are of very good quality
3. Equipment is fairly easy to operate
4. Stencils can be stored and reused
5. Copies don't cost very much

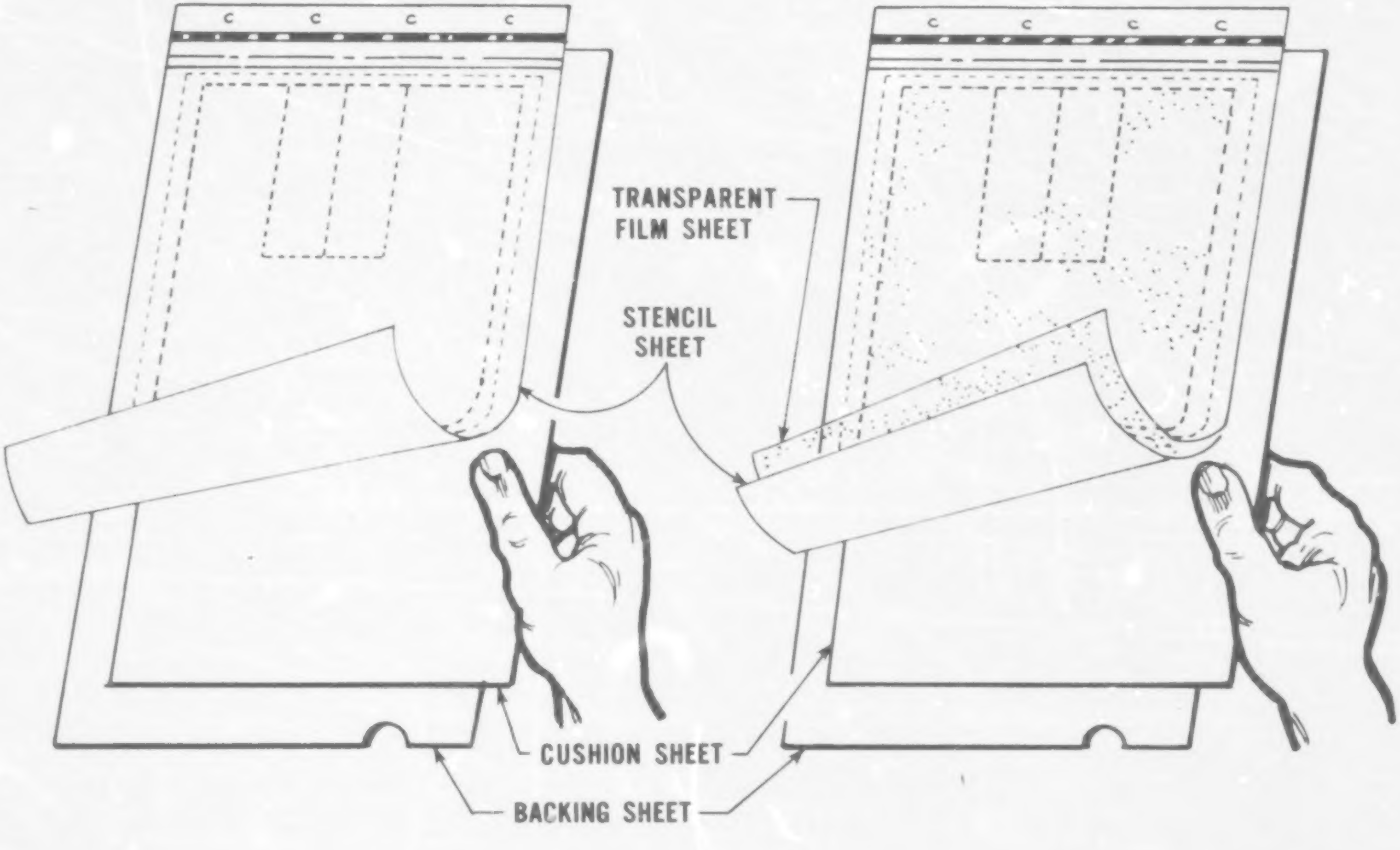
B. Disadvantages

1. The final copy is not as professional as offset press
2. The most copies a stencil can make is up to 3,000

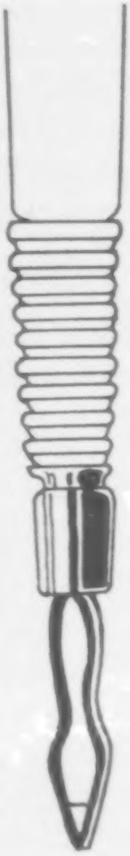
STENCIL DUPLICATOR
(Mimeograph)


FEED ROLL PRESSURE ADJUSTMENT
COPY COUNTER
HORIZONTAL ADJUSTMENT
PAPER SEPARATORS
BRAKE
FEED LEVER
HAND WHEEL
HEAD CLAMP
FEED ROLLERS
MOTOR SWITCH
GUIDE RAIL
RECEIVING TRAY
FEED TABLE
INK MEASURING ROD
GUIDE RAIL KNOB
LATERAL ADJUSTMENT
FEED KNOB
LOWERING LEVER

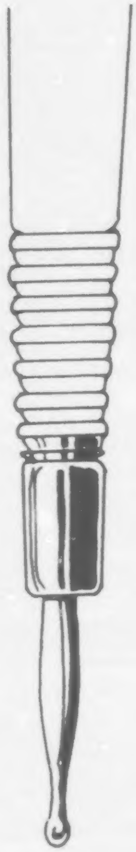
STENCIL PACK


TRANSPARENT FILM SHEET
STENCIL SHEET
CUSHION SHEET
BACKING SHEET

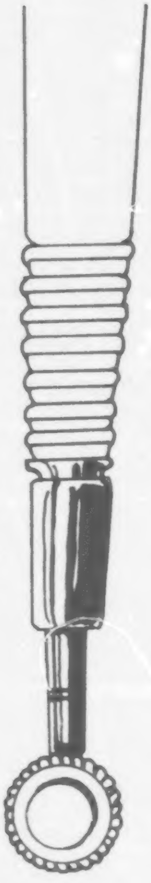
TYPES OF STYLI



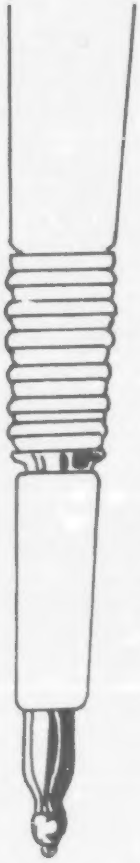
WIRE-LOOP



BALL-POINT

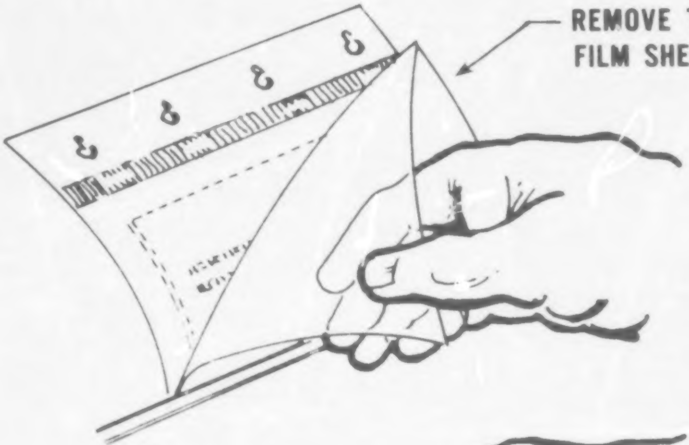


WHEEL

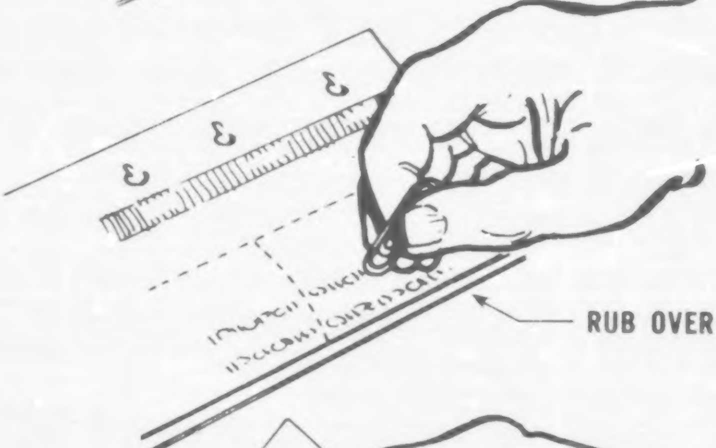


ROLL-POINT

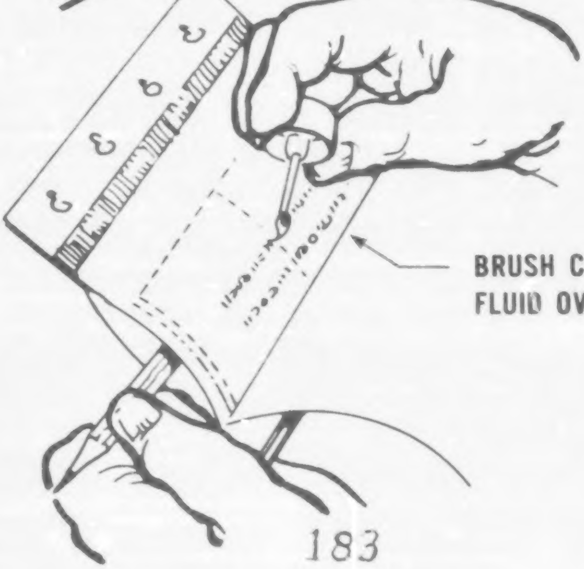
CORRECTING STENCIL



REMOVE TRANSPARENT FILM SHEET

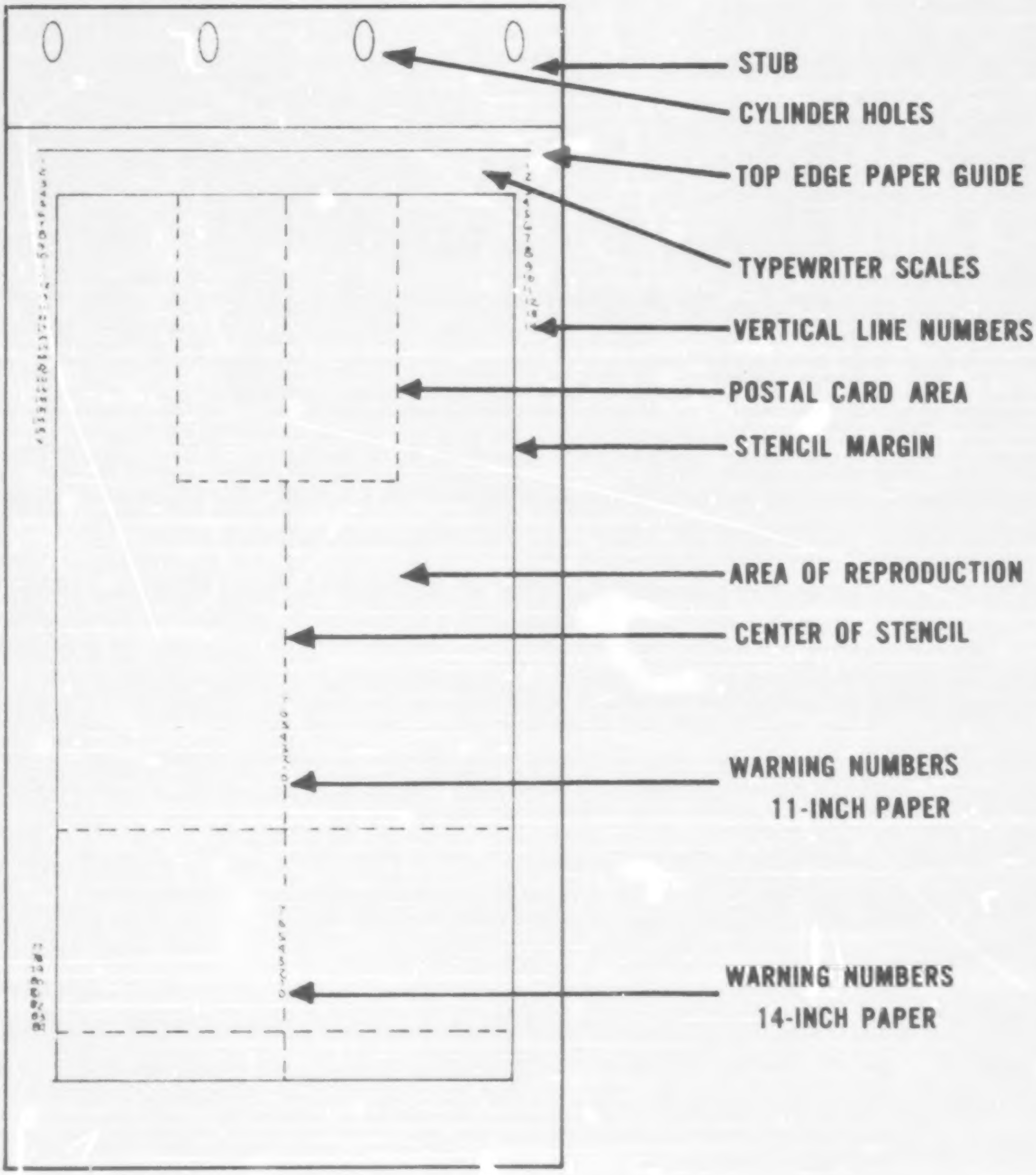


RUB OVER ERROR



BRUSH CORRECTION FLUID OVER ERROR

STENCIL GUIDE MARKS

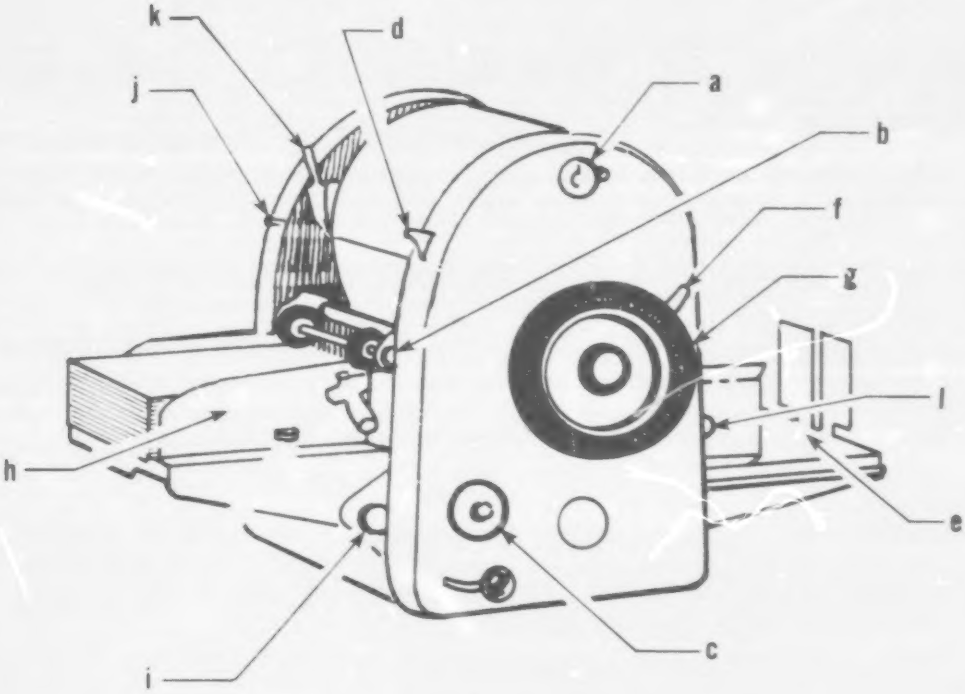

STUB
CYLINDER HOLES
TOP EDGE PAPER GUIDE
TYPEWRITER SCALES
VERTICAL LINE NUMBERS
POSTAL CARD AREA
STENCIL MARGIN
AREA OF REPRODUCTION
CENTER OF STENCIL
WARNING NUMBERS 11-INCH PAPER
WARNING NUMBERS 14-INCH PAPER

UNIT VII

STENCIL DUPLICATION

ASSIGNMENT SHEET #1--PARTS OF THE STENCIL DUPLICATOR

Directions: Identify the parts of the duplicator by placing the proper name of the machine part in the space provided.



a. ____________________

b. ____________________

c. ____________________

d. ____________________

e. ____________________

f. ____________________

g. ____________________

h. ____________________

i. ____________________

j. ____________________

k. ____________________

l. ____________________

UNIT VII

STENCIL DUPLICATION

ASSIGNMENT SHEET #2--USING A STYLUS

Directions: Using a picture or a diagram, draw a copy on a stencil using one or more styli. Have a paper clip and stencil correction fluid available to correct any errors. Be sure to sign your name on the stencil

UNIT VII

STENCIL DUPLICATION

Answers to Assignment Sheets

a. copy counter
b. paper separators
c. receiving tray feed knob
d. feed lever
e. receiving tray
f. brake
g. hand wheel
h. guide rail
i. lateral adjustment
j. horizontal adjustment
k. feed roll pressure adjustment
l. motor switch

Assignment Sheet # 2

Evaluated to the satisfaction of the instructor

UNIT VII

STENCIL DUPLICATION

JOB SHEET #1--TYPING A STENCIL

I. Tools, equipment, and materials required

- A. Stencil pack
- B. Stencil correction fluid
- C. Typewriter
- D. Typewriter cleaning brush
- E. Paper clip
- F. Draft copy of typing to be completed

II. Procedure:

- A. Place typewriter ribbon in white or stencil position.
- B. Unless you are using a film sheet over the stencil, clean typewriter keys with cleaning brush.
- C. Place a cushion sheet between the stencil sheet and the hard backing sheet. Make sure the glossy side of the cushion sheet is facing toward the stencil.
- D. Insert the stencil pack in the typewriter like inserting a regular sheet of paper.
- E. Roll the stencil until the top and bottom of the stencil meet. Engage the paper release lever and align stencil pack. Lock paper release lever and return stencil to typing position.
- F. Move impression control on typewriter to a medium setting.
- G. Set margins and begin typing, using stencil guide marks on stencil sheet.
- H. After typing has been completed, proofread copy before removing stencil from typewriter.

UNIT VII

STENCIL DUPLICATION

JOB SHEET #2--OPERATING STENCIL DUPLICATOR

I. Tools, equipment and materials required:

A. Stencil pack

B. Copy paper

C. Stencil duplicator

II. Procedures:

(Note: These procedures are general. Follow specific instructions contained in operator's manual.)

A. Release brake by moving selector control to OFF

B. Open the clamp and remove the protective drum cover

C. Remove the transparent film sheet and cushion sheet from the stencil. Place the stencil on the drum and close the head clamp. Tear off the stencil backing sheet.

D. Place enough copy paper to handle entire job. Turn the feed lever until copy paper is approximately 1/2 inch from the feed rollers.

E. Turn the power switch ON and make about 5 or 6 copies. Stop the machine and look at the copy.

F. Make any machine adjustments needed to get good copy.

G. Set the copy dial for the number of copies needed. Turn on power switch and run duplicator until desired number of copies are made

H. Turn off the paper feed.

I. Turn off the power switch and remove stencil by holding the loose end of the stencil and carefully removing it from the drum.

J. Release the head clamp and store stencil in a stencil folder

K. Place protective cover on the drum of the machine

L. Set the brake to ON

M. Clean work area and store any supplies

UNIT VII

STENCIL DUPLICATION

UNIT TEST

1. Match the terms on the left relating to stencil duplication with their correct definitions on the right by placing the correct letter in the space provided.

____1. stencil
____2. brake
____3. horizontal adjustment
____4. copy counter
____5. feed roll pressure
____6. lowering lever
____7. feed rollers
____8. feed lever
____9. guide rail
____10. guide rail knob
____11. head clamp
____12. hand wheel
____13. ink measuring
____14. lateral adjustment
____15. motor switch
____16. paper separator
____17. receiving tray
____18. cushion sheet
____19. backing sheet
____20. transparent film
____21. stylus

a. control which starts or stops motor-driven machines
b. guides which hold the paper in the proper position on the feed table
c. a lock which prevents the ink drum from being turned
d. control which lowers feed table
e. cardboard-like sheet behind the cushion sheet
f. instrument used to handwrite or draw on a stencil sheet
g. clean film put over stencil sheet
h. sheet which prevents typewriter keys from tearing stencil sheet
i. device which holds stencil against ink drum
j. wax-coated tissue sheet from which copies are produced
k. adjustment which allows for different weights of paper

____22. vertical placement control

l. dial showing number of copies produced

m. control which raises the paper to the feed rollers

n. stick that measures the level of ink in the machine

o. wheel-like parts which draw the paper into the machine

p. control which can straighten a copy

q. control which manually feeds paper through the machine

r. place which catches and holds reproduced copies

s. control which moves feed table to the left or the right

t. control which allows only one sheet of paper to be fed into the machine at one time

u. control which drops feed rollers to paper being fed into the machine

v. control which moves guide rails to fit different sizes of paper

w. control which raises or lowers the copy

2. Briefly describe the stencil duplication process.

3. List the four parts of a stencil pack.

   a.

   b.

   c.

   d.

4. Place a "√" beside the different styli used in stencil duplication.

   ____a. wire-loop

   ____b. ball-point

   ____c. semi-curved

   ____d. wheel

   ____e. finger-tipped semi-automatic

   ____f. roll-point

5. Put the steps of typing a stencil in their correct order by placing the letters "a" through "h" in the spaces provided.

   ____cushion sheet is placed between the stencil sheet and the hard backing sheet

   ____proofreading the typed stencil must be done

   ____the typewriter keys must be cleaned

   ____the impression control is set

   ____the ribbon color indicated is placed in the stencil position

   ____correct any errors

   ____remove the stencil from the typewriter ____the stencil pack is placed in the typewriter

6. Write down the steps in their correct order for correcting a stencil

7. Place a "✓" beside those procedures used when operating a stencil duplicator.

____the brake on the machine is released by moving the control to the ON position

____the film sheet is removed before the stencil pack is placed on the drum

____the machine is stopped after several copies have been made to check the quality of the reproduced copy

____after the desired number of copies has been run, the stencil is thrown away

____the backing sheet of the stencil pack is torn off after the stencil has been placed on the drum

____copy paper is placed on the feed tray and lowered to within 2 inches of the feed rollers

8. List the cause(s) of faulty reproduction on a stencil duplicator

a. Poorly reproduced copy

b. Multiple sheets

c. Skip feeding

d. Backside of copy smudged

e. Streaking and spots

f. Half-size letters on copy

g. Copy too high or low

h. Copy too far left or right

9. List the advantages of stencil duplicators.

   a. Advantages

      1.

      2.

      3.

      4.

      5.

   b. Disadvantages

      1.

      2.

10. Demonstrate the ability to:

   a. Label parts of a stencil duplicator

   b. Use a stylus

   c. Type a stencil

   d. Operate a stencil duplicator

   (NOTE: If the above activities have not been accomplished prior to the test, ask the instructor when they should be completed.)

UNIT VII

STENCIL DUPLICATION

ANSWERS TO UNIT TEST

1. j stencil
c brake
p horizontal adjustment
l copy counter
k feed roll pressure
m feed knob
d lowering lever
o feed rollers
u feed lever
b guide rail
v guide rail knob
i head clamp
q hand wheel
n ink measuring rod
s lateral adjustment
a motor switch
t paper separator
r receiving tray
h cushion sheet
e backing sheet
g transparent film
f stylus
w vertical placement control

2. The answer should include the following:

   The process involves preparing a stencil. The stencil is placed on the duplicator. When the ink flows through the impression made on the stencil and comes in contact with the copy paper, reproduction occurs.

3. a. stencil sheet

   b. cushion sheet

   c. backing sheet

   d. film sheet

4. ✓ a.

   ✓ b.

   ___ c.

   ✓ d.

   ___ e.

   ✓ f.

5. c

   f

   b

   e

   a

   g

   h

   d

6. a. Roll master up and remove transparent film sheet.

   b. Rule over the error using a smooth object very gently in a circular motion.

   c. Lift stencil sheet out from cushion or backing sheet and brush correction fluid over the error. Hold in this position until dry.

   d. Replace transparent film sheet, roll back to typing position and type over corrected error.

7. ____

✓

✓

____

✓

____

8. a. Poorly reproduced copy caused by either a low ink supply or uneven typewriter strokes.

   b. Multiple sheets caused by copy sheets sticking together or feed mechanism not working right.

   c. Skip feed caused by feed mechanism being dirty or working improperly.

   d. Back side of copy smudged caused by ink on the stencil or impression roller.

   e. Streaking and spots caused by either the feed rollers being dirty or ink leakage from stencil

   f. Half-size letters on copy caused by wrinkles on the stencil.

   g. Copy too high or low caused by improper vertical placement.

   h. Copy too far left or right caused by improper centering.

9. Advantages

   1. Equipment costs are low

   2. Copies are of very good quality

   3. Equipment is fairly easy to operate

   4. Stencils can be stored and reused

   5. Copies don't cost very much

10. Evaluated to the satisfaction of the instructor.

UNIT VIII -

FLUID DUPLICATION

UNIT OBJECTIVE

After completing this unit, the student should be able to identify terms and explain the fluid duplication process; and list steps in preparing a fluid master set and in operating the fluid duplicator. This knowledge will be evidenced through demonstration of preparing a master set and operating a fluid duplicator, and satisfactorily completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student should be able to:

1. Match parts of the fluid duplicator with their correct definition
2. List the various names describing the fluid duplicating process
3. Explain the fluid duplicating operation
4. Number the steps in preparing a fluid master set
5. Identify proper procedures in fluid duplicator operation
6. List advantages and disadvantages of using a fluid duplicator
7. Identify parts of the fluid duplicator
8. Demonstrate the ability to:
    a. Prepare a fluid master set
    b. Operate the fluid duplicator

UNIT VIII

FLUID DUPLICATION

SUGGESTED ACTIVITIES

I. Instructor:

   A. Provide objectives sheet

   B. Provide information and job sheets

   C. Make transparencies

   D. Discuss terminal and specific objectives

   E. Discuss information sheet

   F. Demonstrate and discuss procedures outlined in the job sheets

   g. Vary the color of the masters on the job sheets

   h. Have students run post cards, routing slips, and other materials after they are familiar with the machine operations

II. Students:

   A. Read objectives

   B. Study information sheet

   C. Demonstrate ability to accomplish procedures outlined on job sheets

   D. Take test

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objectives

   B. Information sheet

   C. Transparencies

      1. VIII-TM-1--Parts of a Fluid Duplicator

      2. VIII-TM-2--Fluid Duplicator Machine Parts

    3. VIII-TM-3--The Fluid Master Set
    4. VIII-TM-4--Correcting Master Sheet

D. Job Sheets

    1. Job Sheet #1--Preparing a Master
    2. Job Sheet #2--Operating the Fluid Duplicator

E. Test

F. Answers to test

II. References

A. Bauer, Dennis E. and John W. Strahl. Office Reproduction Processes. San Francisco: Canfield Press, 1975, pp. 1-24.

B. Gregg, John Robert and others. Applied Secretarial Procedures. 7th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

C. Fasnacht, Harold and others. How to Use Business Machines. 3rd ed., New York: McGraw-Hill Book Company, 1969.

D. Pasewark, William R. and Mary Ellen Oliverio. Clerical Office Procedures. 6th ed., Cincinnati, Ohio: South-Western Publishing Co., 1978.

E. Pasewark, William R. Duplicating Machine Processes. 2nd ed. Cincinnati: South-Western Publishing Co., 1975.

UNIT VIII

FLUID DUPLICATION

INFORMATION SHEET

I. Terms and Definitions

A. Clamp control--Control used to open and close the locking mechanism which holds material against the drum

B. Counter--Dial which shows the number of copies being printed

C. Drum (cylinder)--Part of the machine which holds the master

D. Feed control--Adjustment control which varies pressure of rollers to handle different weights of paper

E. Feed rollers--Small rollers which rest on top of paper being fed into the machine

F. Feed tray--Shelf where paper is stacked to be fed into the machine

G. Fluid duplicating--Term used to describe the process of producing a reproduction of an original copy through a fluid duplicator

H. Fluid master set--An original master face sheet, with an attached carbon sheet which deposits its carbon on the back side of the master face sheet

I. Fluid tank--Container which holds the fluid that wets the paper going into the machine

J. Impression control--Unit which controls the lightness and darkness of the printed copy

K. Motor switch--Dial or switch that turns the duplicating machine ON or OFF

L. Paper guides--Attachments on the duplicating machine which position the paper going into the machine

M. Receiving tray--Place where reproduced copies are stacked as they come out of the machine

N. Selector--Control which adjusts the machine to handle different sizes of paper

II. Introduction to Fluid Duplicator

A. Earliest form of fluid duplicating appeared in the year 1880. It was originally called the aniline dye process.

B. The fluid duplicating process may be called by names such as: liquid, spirit, direct, and ditto.

C. There are at least 20 manufacturers making fluid duplicators. Each machine is operated about alike. If someone is trained to run one kind of machine, it will be easy for that person to learn how to run another brand.

III. Fluid Duplicator Process

A. At first, the operation was called the aniline dye process. This operation included chemical processing.

B. A 2-sheet pack of paper was first used, with the first sheet being slick and the second sheet made up of aniline dye. When a person would type up the first sheet, portions of the dye from the second sheet would be transferred to the back side of the front sheet.

C. The master sheet was then placed on a drum. As the drum turned, a roller would take a small amount of dye from the sheet and place it on a fresh sheet of paper.

D. Today, the rollers have been replaced by an internal procedure which takes care of wetting the paper so that the dye can be placed on the paper.

IV. Preparation of a Master

A. The keys on the typewriter should be well cleaned

B. The tissue sheet is removed from the fluid master

C. The fluid master set is fed into the typewriter with the open end going in first

D. The margins and tabs on the typewriter are then set for any typing. At least 1/2 inch space should be allowed on the top and bottom of the master before any typing begins.

E. All errors made while typing should be corrected immediately by one of the following:

  1. Razor blade

  2. Blockout wax

  3. Pencil-type eraser

  4. Razor blade and blockout wax together

F. The page should be proofread before the fluid master set is removed from the typewriter

G. After the master is removed from the typewriter, the tissue sheet is again placed between the two sheets

H. The work area should be cleaned and any supplies should be stored

V. Fluid Duplicator Operation

(NOTE: These procedures are general in nature, and may not apply to all commercial fluid duplicators.)

A. Prior to operating the machine, the operator should remove or fasten any loose jewelry, neckties, scarves, or similar items that could catch in the machine

B. Check fluid tank and if the fluid is low, fill the tank to the proper level

C. After the paper has been fanned, place it on feed tray. The paper guides and rubber grippers should be adjusted at this time.

D. "Prime" the machine to allow the wick of the machine to become wet enough

E. Attach the master to the drum of the machine and set counter for the number copies needed

F. Make a trial run of 5 or 6 copies to check placement and quality of copies

G. After the right number of copies has been run, remove master by reversing the steps you took when attaching the master

H. The master can be stored to be used again

VI. Advantages and Disadvantages of a Fluid Duplicator

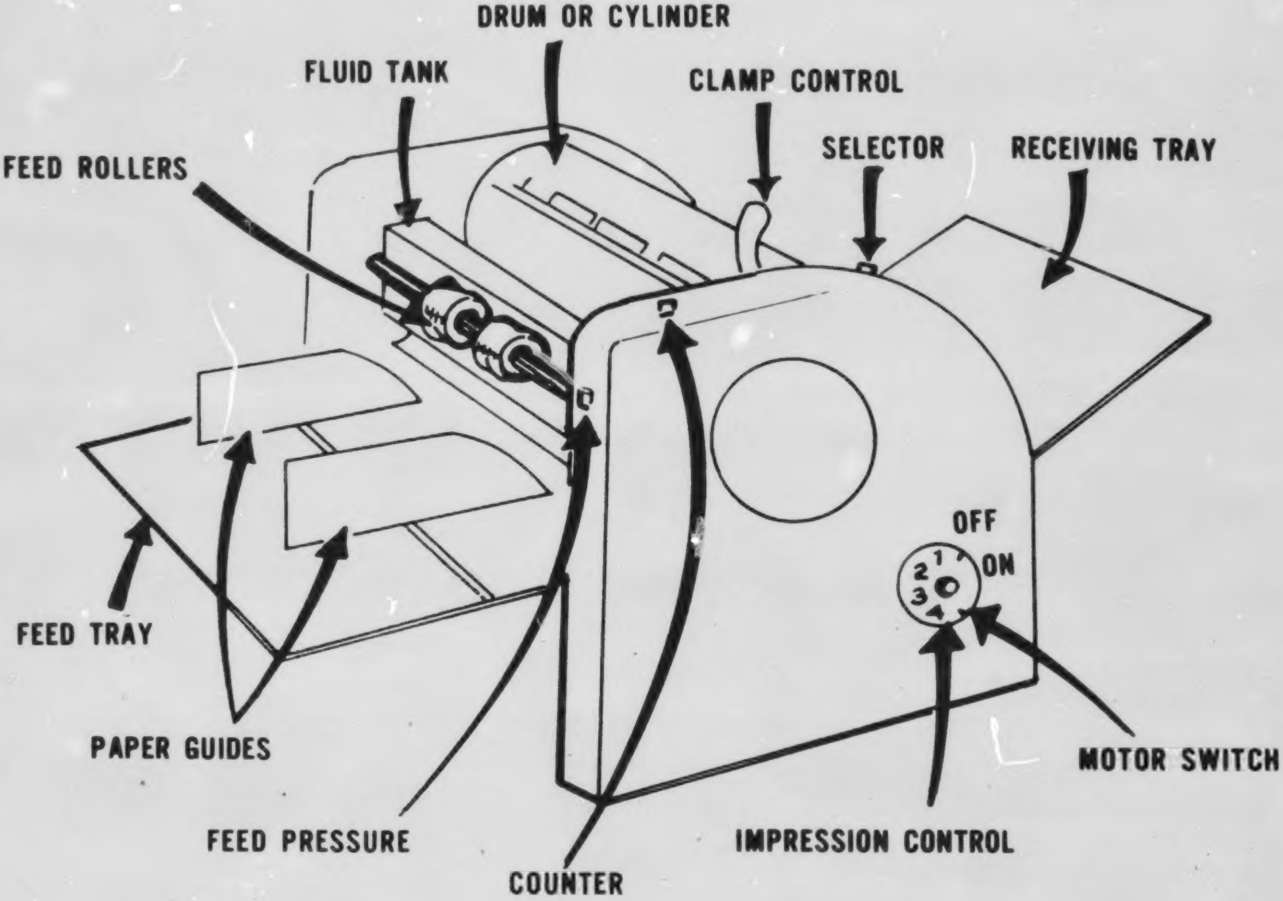
A. Advantages

1. Finished copy can be produced quickly
2. Copying paper doesn't cost much
3. The operation is easy to learn
4. Operating costs are low when compared to other types of duplicating equipment

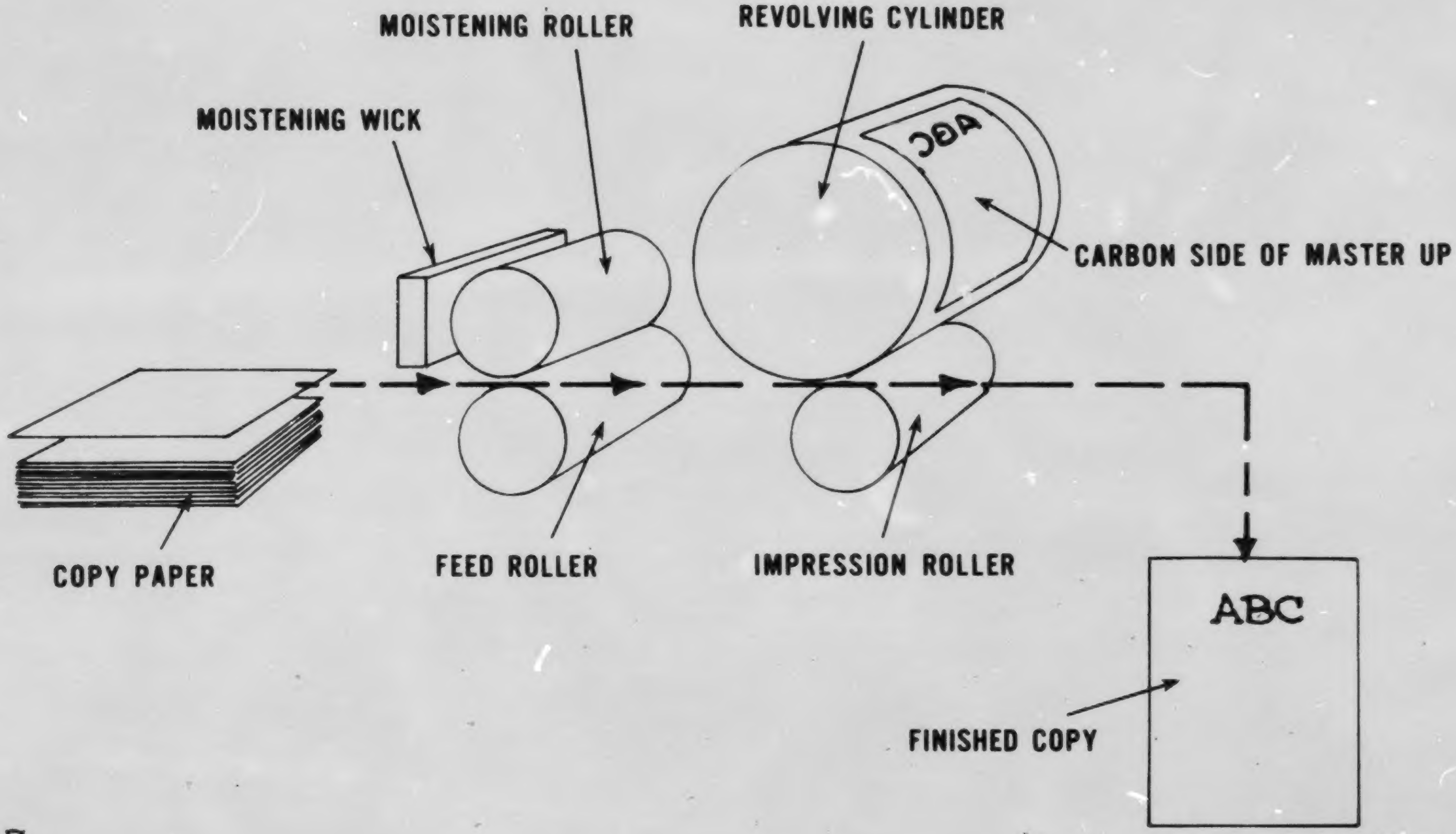
B. Disadvantages

1. A maximum of only 200 quality copies can be made from a master
2. Direct sunlight can fade a copy
3. Correcting errors can result in smeared carbon deposits
4. The quality of the reproduced copy is not as good as with other duplicating processes

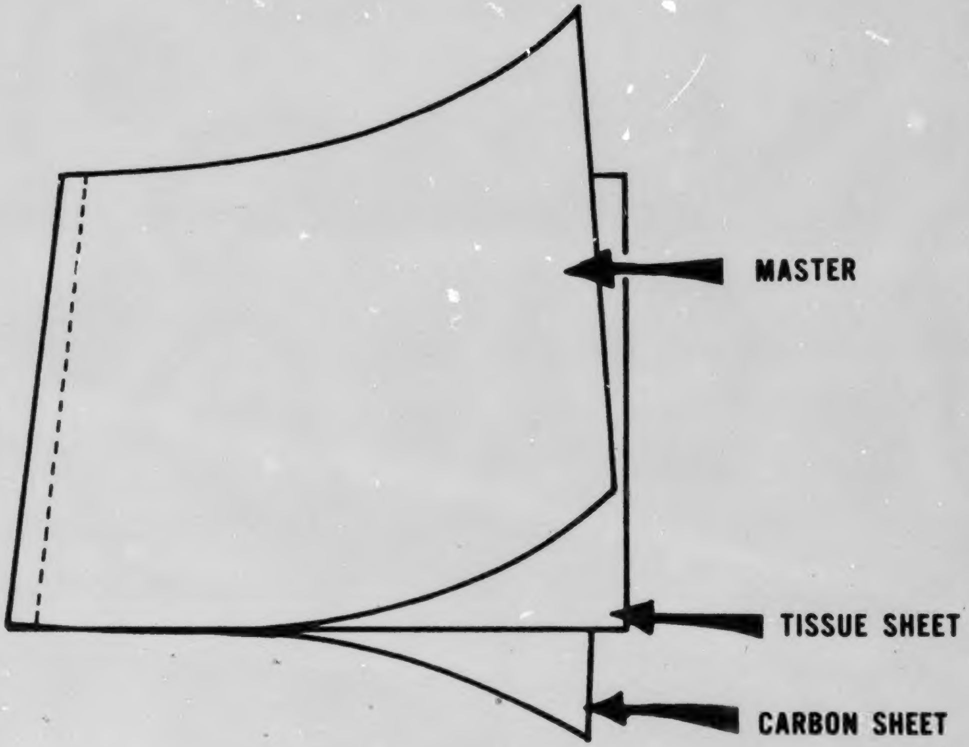
PARTS OF A FLUID DUPLICATOR


DRUM OR CYLINDER
FLUID TANK
CLAMP CONTROL
SELECTOR
RECEIVING TRAY
FEED ROLLERS
OFF
1
2
ON
3
4
FEED TRAY
PAPER GUIDES
MOTOR SWITCH
FEED PRESSURE
IMPRESSION CONTROL
COUNTER

FLUID DUPLICATOR MACHINE PARTS

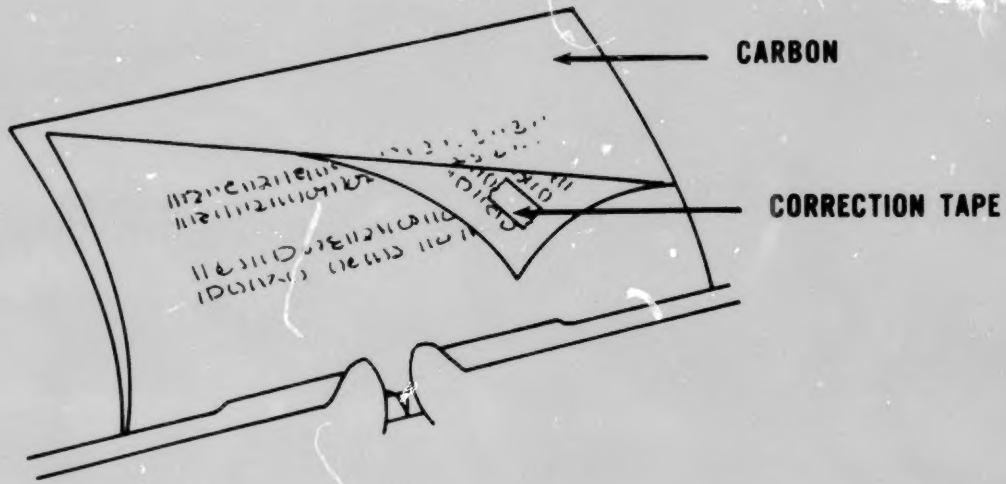

MOISTENING ROLLER
REVOLVING CYLINDER
MOISTENING WICK
ABC
CARBON SIDE OF MASTER UP
COPY PAPER
FEED ROLLER
IMPRESSION ROLLER
ABC
FINISHED COPY

THE FLUID MASTER SET

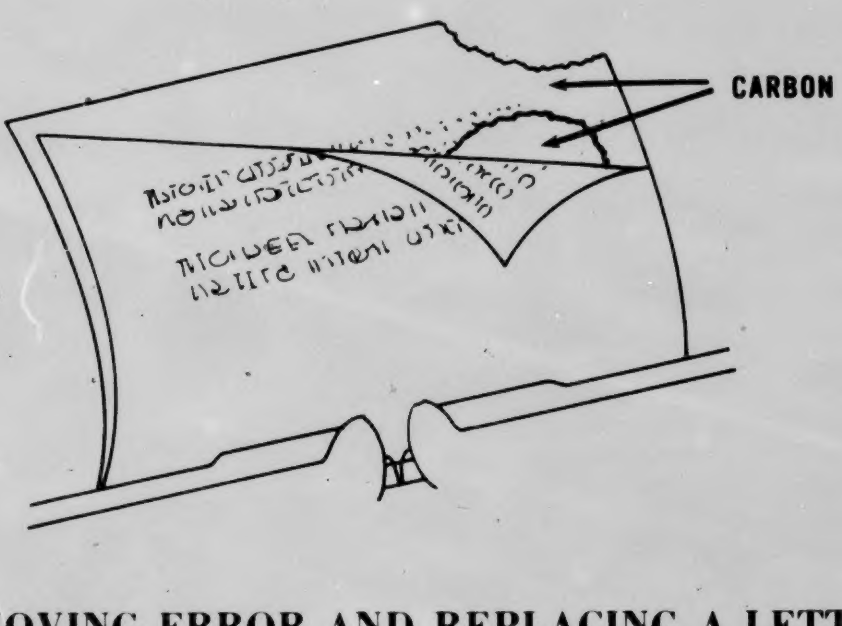

MASTER
TISSUE SHEET
CARBON SHEET

TM-3

CORRECTING MASTER SHEET


CARBON
CORRECTION TAPE

REMOVING ERROR ONLY



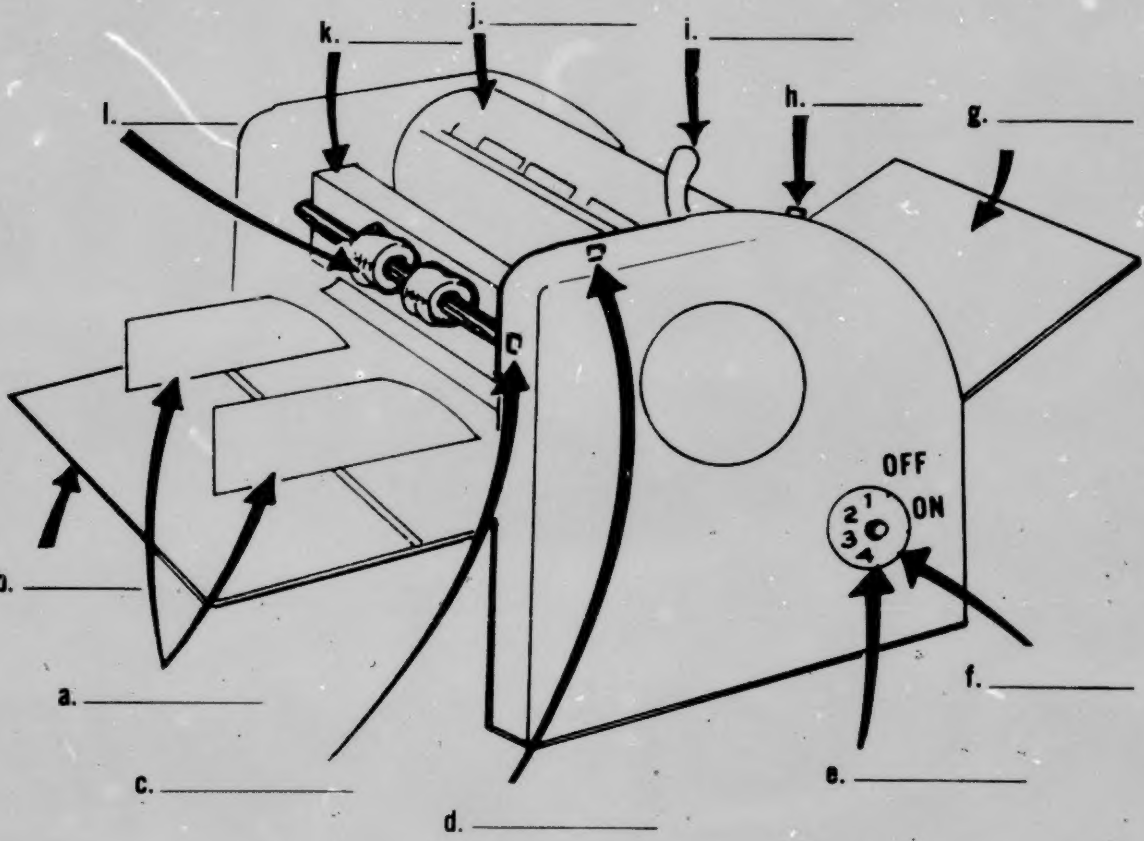
REMOVING ERROR AND REPLACING A LETTER

UNIT VIII

FLUID DUPLICATION

Assignment Sheet #1--Parts of the Fluid Duplicator

Directions: Identify the parts of the fluid duplicator by putting the name of the part in the space provided



motor switch

feed tray

impression control

counter

paper guides

feed tray

feed rollers

selector

clamp control

fluid tank

drum or cylinder

receiving tray

UNIT VIII

FLUID DUPLICATION

Answers to Assignment Sheet # 1

a. paper guides
b. feed tray
c. feed pressure
d. counter
e. impression control
f. motor switch
g. receiving tray
h. selector
i. clamp control
j. drum or cylinder
k. fluid tank
l. feed rollers

UNIT VIII

FLUID DUPLICATION

JOB SHEET #1--PREPARING A MASTER

I. Tools and equipment

- A. Fluid master set
- B. Typewriter (electric or manual)
- C. Razor blade
- D. Pencil eraser
- E. Blockout wax
- F. Cleaning brush
- G. Typewriter cleaning fluid
- H. Draft typing exercise
- I. Material to be typed
- J. Correction tape

II. Procedure

- A. Check to see that the typewriter (keys or element) is clean. If not, clean the typewriter following procedures recommended by typewriter manufacturer
- B. Obtain a fluid master set and remove the tissue sheet between the face sheet and carbon sheet
- C. Feed the fluid master set into the typewriter open end first
- D. Set typewriter tabs and margins for the required spacing. Allow at least 1/2 inch of space on top and bottom of fluid master sheet.
- E. Adjust impression control to a low setting if the typewriter has this feature
- F. Begin typing and if a mistake is made correct the error immediately

a. To remove an error, cut it out with a razor blade or cover it with blockout wax

b. To remove an error and replace with another letter, remove the error and type with correction by placing a small piece of carbon behind the master where the correction will be typed

G. After correcting the error, make sure the piece of carbon is removed

H. Finish typing the required information and proofread the entire page before removing the fluid master set from the typewriter

I. Remove master set from the typewriter and insert the tissue sheet between the master sheet and the carbon sheet

J. Clean up work area and store any supplies

UNIT VIII

FLUID DUPLICATION

JOB SHEET #2--OPERATING THE FLUID DUPLICATOR

I. Tools and equipment needed

   A. Duplicating fluid

   B. Fluid master set

   C. Fluid duplicator

   D. Copying paper

   E. Cleaning rag

   F. Cleaning fluid

II. Procedures

   A. Remove any jewelry or loose wearing apparel accessories

   B. Check level of fluid in fluid tank. If the level is low, fill the tank at the recommended level

   C. Fan copying paper by holding pack of paper at the end with one hand and letting the paper fan across the thumb of your other hand

   D. Place copy paper on the feed tray and adjust feed roller and paper guides

   E. Prime the machine by allowing the drum of the machine to rotate five or six times

   F. If any odd marks are on the clean paper after it has moved through the machine, clean the carbon deposits on the duplicator drum with a cloth and cleaning fluid

   G. Turn pressure level to lowest level

   H. Attach the master by opening the clamp lever and insert master into the slot. Make sure the carbon deposit side of the master is facing out from the surface of the drum

   I. Set counter dial for desired number of copies

J. Turn the ON/OFF switch and test-run five or six copies. Check the placement of the image on the copy and make any adjustments necessary

K. Run desired number of copies and adjust pressure level to the next higher position when copy begins to fade

L. Remove the master by reversing the steps used in attaching the master

M. Place tissue sheet against carbon deposit side of the master. Place master and tissue sheet on top of a fresh sheet of paper and either clip or staple all three pieces together

N. Clean up work area and store paper and supplies

UNIT VIII

FLUID DUPLICATION

UNIT TEST

1. Match the terms relating to the fluid duplicator on the left with their correct definitions on the right

_____clamp control

_____counter

_____drum

_____fluid tank

_____paper guides

_____receiving tray

_____motor switch

_____impression control

_____selector

_____fluid duplicating

_____feed tray

_____feed roller

_____feed control

_____fluid master set

a. dial that turns machine on or off

b. unit controlling lightness or darkness of reproduced copy

c. attachments on fluid duplicator which position paper

d. control which adjusts the machine to handle different sized of paper

e. part of the fluid duplicator that holds the master

f. control used to open and close locking mechanism which holds material against the drum

g. dial which shows the number of copies being produced

h. adjustment control which changes pressure of rollers to handle different weights of paper

i. small rollers which rest on top of paper being fed into the machine

j. container holding the fluid that moistens the paper going into the machine

k. term describing the process of producing a reproduction of an original copy by using a fluid duplicator

l. shelf that stacks the reproduced copies coming out of the machine

m. shelf where paper is stacked to be fed into the machine

n. master sheet with an attached carbon sheet

2. List the four names describing the fluid duplicating process

a.

b.

c.

d.

3. Briefly explain the fluid duplicating process

4. Number in their proper order the following steps in preparing a master set, placing the number of the step in the space provided

____ The fluid master set is fed into the typewriter

____ The keys on the typewriter are thoroughly cleaned

____ The margins and tabs on the typewriter are set

____ Placing the tissue sheet between the front sheet and the carbon sheet

____ Removing the tissue sheet after a master set is obtained

____ Correcting all typing errors

____ Proofreading entire page

____ Cleaning the work area and storing any supplies

5. Place a "√" beside those steps involved in fluid duplicator operation

____ The machine is primed

____ The drum of the machine is removed

____ The fluid tank is filled if low

____ The paper is fanned

____ The master is attached to the impression control

____ A trial run of four (4) to five (5) copies is made

____ The master is never removed from the drum

____ The counter on the fluid duplicator is set

6. List four advantages and disadvantages of using a fluid duplicator

   a. Advantages

      (1)

      (2)

      (3)

      (4)

   b. Disadvantages

      (1)

      (2)

      (3)

      (4)

7. Label parts of the fluid duplicator

8. Demonstrate the ability to:

   a. Prepare a fluid master set

b. Operate the fluid duplicator

(NOTE: If activities #7 and #8 have not been accomplished prior to the test, ask the instructor when they should be completed.)

UNIT VIII

FLUID DUPLICATION

ANSWERS TO UNIT TEST

1. f clamp control

g counter

e drum

j fluid tank

c paper guides

l receiving tray

a motor switch

b impression control

d selector

k fluid duplicating

m feed tray

i feed roller

h feed control

n fluid master set

2. liquid

spirit

direct

ditto

fluid

3. The answer should include the following:

The operation was originally called the aniline dye process.

The process involved the transferring of dye from one sheet to the backside of an original sheet.

The dye from the sheet would deposit on a fresh sheet of paper when placed on a drum.

4. 3
   1
   4
   7
   2
   5
   6
   8

5. ✓ The machine is primed
   ___ The drum of the machine is removed
   ✓ The fluid tank is filled if low
   ✓ The paper is fanned
   ___ The master is attached to the impression control
   ✓ A trial run of four(4) to five(5) copies is made
   ___ The master is never removed from the drum
   ✓ The counter on the fluid duplicator is set

6. a. Advantages

   1. Finished copy can be produced quickly
   2. Copying paper is relatively inexpensive
   3. The operation is easy to learn
   4. Operating costs are low in comparison to other duplicating methods

   b. Disadvantages

   1. A maximum of only 200 quality copies can be reproduced from a master
   2. Direct sunlight can fade a reproduced copy

   3. Correcting errors can result in smeared carbon deposits

   4. The quality of the reproduced copy is not as high as with other methods

7. Evaluated to the satisfaction of the instructor

8. Evaluated to the satisfaction of the instructor

UNIT IX

OFFSET DUPLICATION

UNIT OBJECTIVE

After completing this unit of instruction, the student should be able to define terms related to the offset process, identify the offset systems, list advantages and disadvantages of using the offset, and demonstrate the ability to prepare and process the offset master and operate the offset duplicator. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to:

1. Define terms associated with the offset process
2. Select procedures describing the offset process
3. Identify the offset press systems
4. List advantages and disadvantages of the offset
5. Demonstrate the ability to:
    a. Prepare the offset master
    b. Operate the platemaker
    c. Process the offset plate
    d. File and store offset master
    e. Ink the offset duplicator
    f. Operate the offset duplicator
    g. Clean up the offset duplicator

UNIT IX

OFFSET DUPLICATION

SUGGESTED ACTIVITIES

I. Instructor:

  A. Provide objective sheet

  B. Discuss objective sheet

  C. Provide information sheet

  D. Prepare supplemental information for information sheet

  E. Discuss information sheet

  F. Prepare transparencies

  G. Demonstrate and discuss procedures outlined on job sheets

  H. Give test and evaluate results

II. Student:

  A. Read objective sheet

  B. Discuss objective sheet

  C. Read information sheet

  D. Discuss information sheet and supplemental information provided by instructor

  E. View transparencies

  F. Complete job sheets

  G. Complete unit test

INSTRUCTIONAL MAT[illegible]ALS

I. Included in this unit;

  A. Objective sheet

  B. Information sheet

C. Transparency masters
   1. IX-TM-1--Direct Image Paper Master
   2. IX-TM-2--The Reverse Image Process
   3. IX-TM-3--The Offset Systems
   4. IX-TM-4--Offset Duplicator Parts
   5. IX-TM-5--Platemaker

D. Job sheets
   1. Job Sheet #1--Prepare the Offset Master
   2. Job Sheet #2--Operate the Platemaker
   3. Job Sheet #3--Process the Offset Plate
   4. Job Sheet #4--File and Store Offset Masters
   5. Job Sheet #5--Ink the Offset Duplicator
   6. Job Sheet #6--Operate the Offset Duplicator
   7. Job Sheet #7--Clean up the Offset Duplicator

E. Unit test

F. Answers to unit test

II. References

A. A. B. Dick. Operating Instructions--Model 111 Offset Platemaker. Chicago, Illinois: A. B. Dick Company, 1970.

B. Operating Instructions--Models 324 and 326 Offset Duplicators. Chicago, Illinois: A. B. Dick Company, 1971.

C. Benevento, Frank S. The Offset Printing Unit. Pittsburgh, Pennsylvania: Graphic Arts Technical Foundation, 1970.

D. Cogoli, John E. Photo Offset Fundamentals. 3 red. ed. Bloomington, Illinois: McKnight Publishing Company, 1973.

E. Pasewark, William R. Duplicating Machine Processes. 2nd ed. Cincinnati, Ohio: South-Western Publishing Co., 1975.

UNIT IX

OFFSET DUPLICATION

INFORMATION SHEET

I. Terms and definitions

   A. Offset plate--Thin sheet of paper, plastic,or metal which has a printing image

   B. Offset duplicator--Machine which transfers the image from an offset plate to paper. Printing unit consists of a plate cylinder, blanket cylinder, and impression cylinder.

   C. Platemaker--Machine which photographs material onto an offset plate to be used for duplicating

   D. Plate (master) cylinder--Drum used to hold the offset plate in place and bring the plate into contact with the dampening rollers

   E. Blanket cylinder--Drum on the offset duplicator used to hold a rubber blanket which comes into contact with the inked image on the plate cylinder

   F. Impression cylinder--Cylinder which carries the paper inside the offset duplicator

II. The offset process

   A. The offset process is based on the principle that oil and water will not mix. In offset duplication, that means that an oil-base printing ink and a water-base liquid solution will not mix.

   B. Copies on an offset duplicator are produced from a paper or metal master which is sometimes called the plate.

   C. A direct image is placed on the master. The master is attached around a rotating cylinder called the plate (or master) cylinder.

   D. As the master cylinder turns, the master is brought into contact with a small roller (water roller) moistened with a water-base solution. This solution sticks to the area of the master that has no images but will not stick to the image areas.

E. As the master cylinder turns, an ink roller contacts the master. The ink from the ink roller sticks to the image areas only. The image now appears in the form of ink on a wet water-based background.

F. As the master returns it comes in contact with another large cylinder which has a large sheet of rubber wrapped around it (called a blanket). When both cylinders rotate, the image from the master cylinder is transferred to the blanket cylinder. The image on the blanket cylinder is the reverse of the image that was on the master (or plate) cylinder.

G. An impression roller presses a clean piece of copy paper against the blanket cylinder and the ink on the blanket cylinder now goes on the paper. The printed copy comes out on the other side of the machine.

III. Offset Press Systems

A. Dampening System

1. In this system, dampening rollers apply a film of dampening solution to the surface of the offset plate, which is wrapped around the plate cylinder.

2. The dampening solution sticks only to the clear areas of the plate.

B. Inking System

1. After the plate has been dampened, the ink rollers apply a film of ink which sticks only to the image portion of the plate.

2. This process of dampening and inking continues throughout the running of the press. In this way, the non-printing areas of the plate remain clear and the ink stays on the plate image area.

C. Main Printing Unit

1. The inked plate image is transferred to the surface of the blanket (on the blanket cylinder) when the plate cylinder and the blanket cylinder come into contact with each other.

2. The image on the blanket is printed on a sheet of paper as it passes between the blanket and impression cylinders.

D. Feeding Unit

1. Most large paper presses have feeders which operate by air-vacuum.

2. A blast of air separates the top sheets, causing them to float individually.

3. Most small duplicators have rubber feed rollers.

4. The feed table maintains the paper stack at the correct height.

5. Sheet separators keep all but the top sheet from going into the machine.

E. Register Board and Sheet Controls

1. Is found only on large offset presses.

2. Allows the sheet to be put into place so that it is ready to be gripped by the rollers which will carry the paper into the machine.

F. Delivery System

1. On most duplicators, the printed sheet is ejected from the machine into a delivery tray.

2. On larger presses, the sheet is placed into a receding stacker where the paper is stacked neatly.

IV. Advantages and Disadvantages of the Offset

A. Advantages

1. The quality of the copy looks as good as the original.

2. Each copy is of the same high quality.

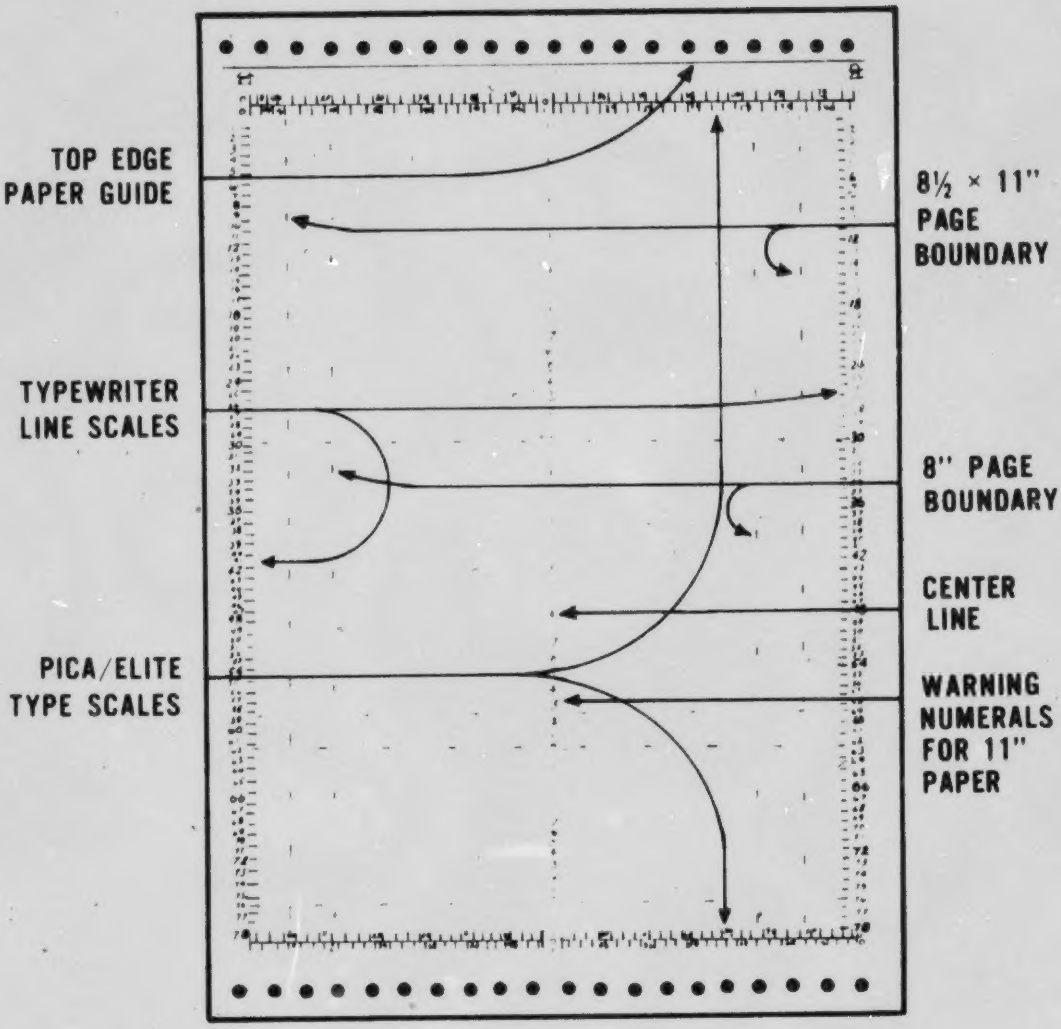
3. Printing can be done in color.

4. Many copies can be produced in a short period of time.

B. Disadvantages

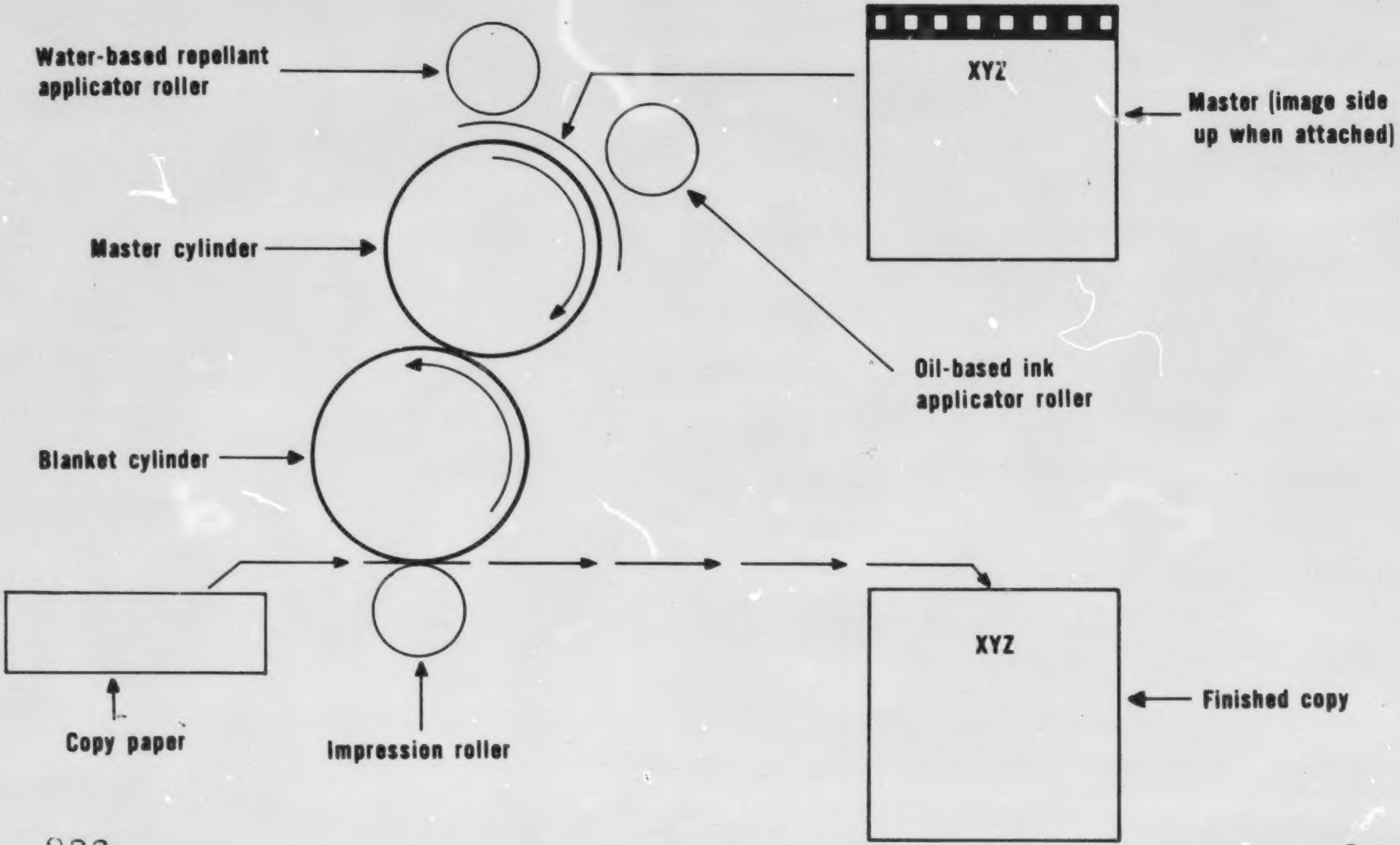
1. Equipment is more expensive than that for other forms of duplication.
2. The procedures in operating the machine are harder.
3. It is more expensive to keep up the machine.
4. Material costs are higher than for other types of duplicating machines.

DIRECT IMAGE PAPER MASTER

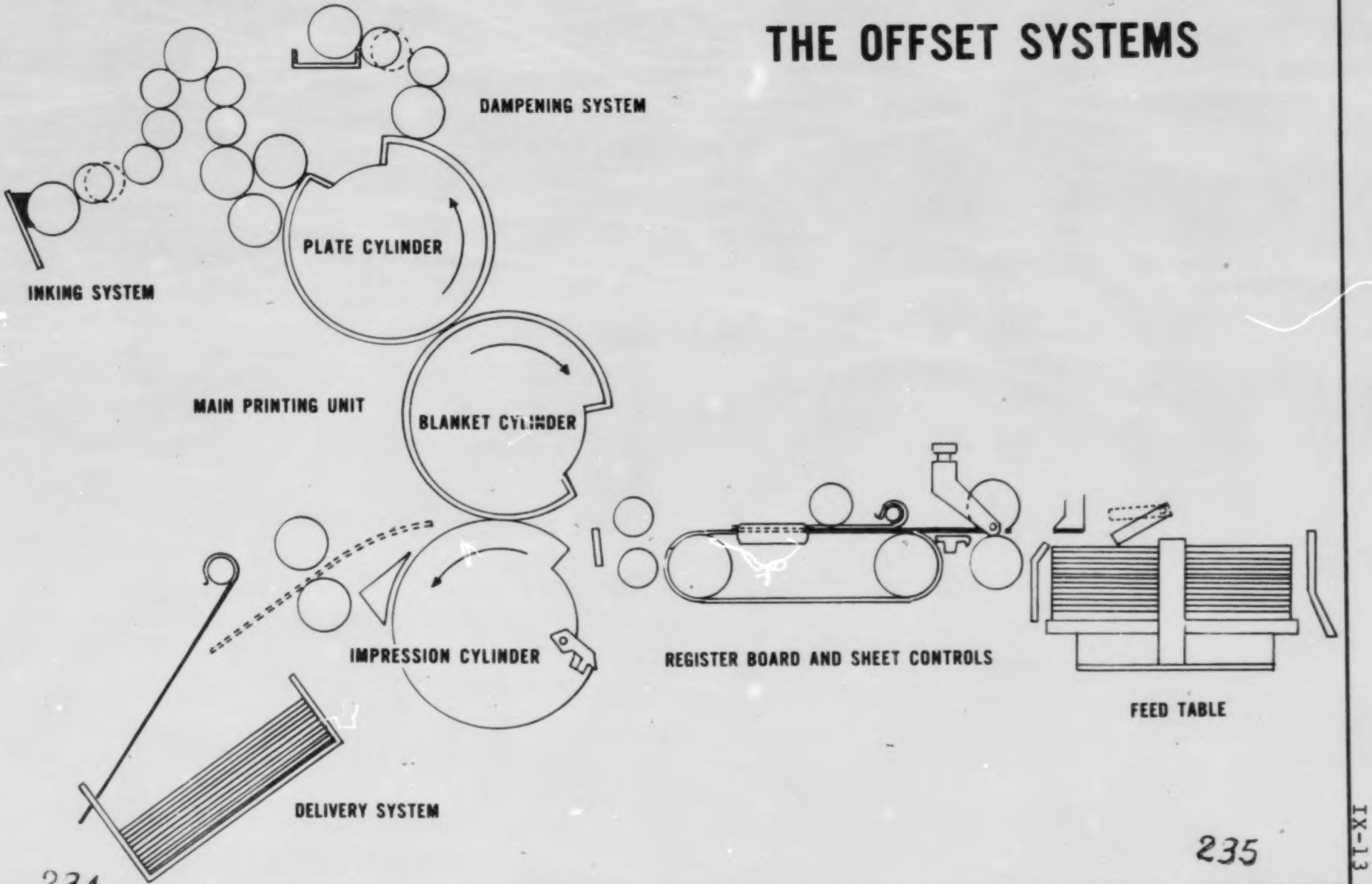

TOP EDGE PAPER GUIDE
TYPEWRITER LINE SCALES
PICA/ELITE TYPE SCALES
8½ × 11" PAGE BOUNDARY
8" PAGE BOUNDARY
CENTER LINE
WARNING NUMERALS FOR 11" PAPER

8

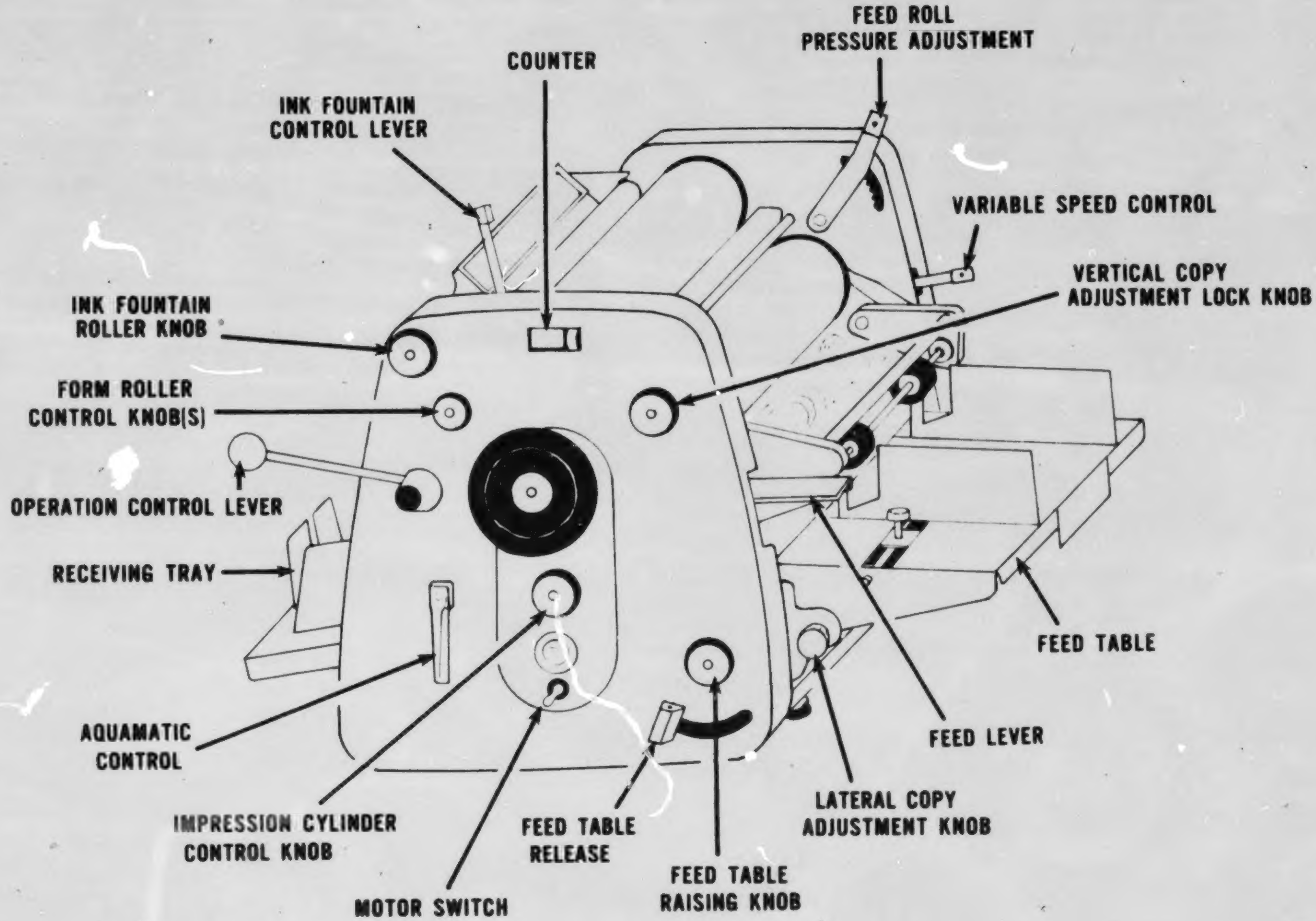
THE REVERSE IMAGE PROCESS


Water-based repellant applicator roller
XYZ
Master (image side up when attached)
Master cylinder
Oil-based ink applicator roller
Blanket cylinder
XYZ
Finished copy
Copy paper
Impression roller

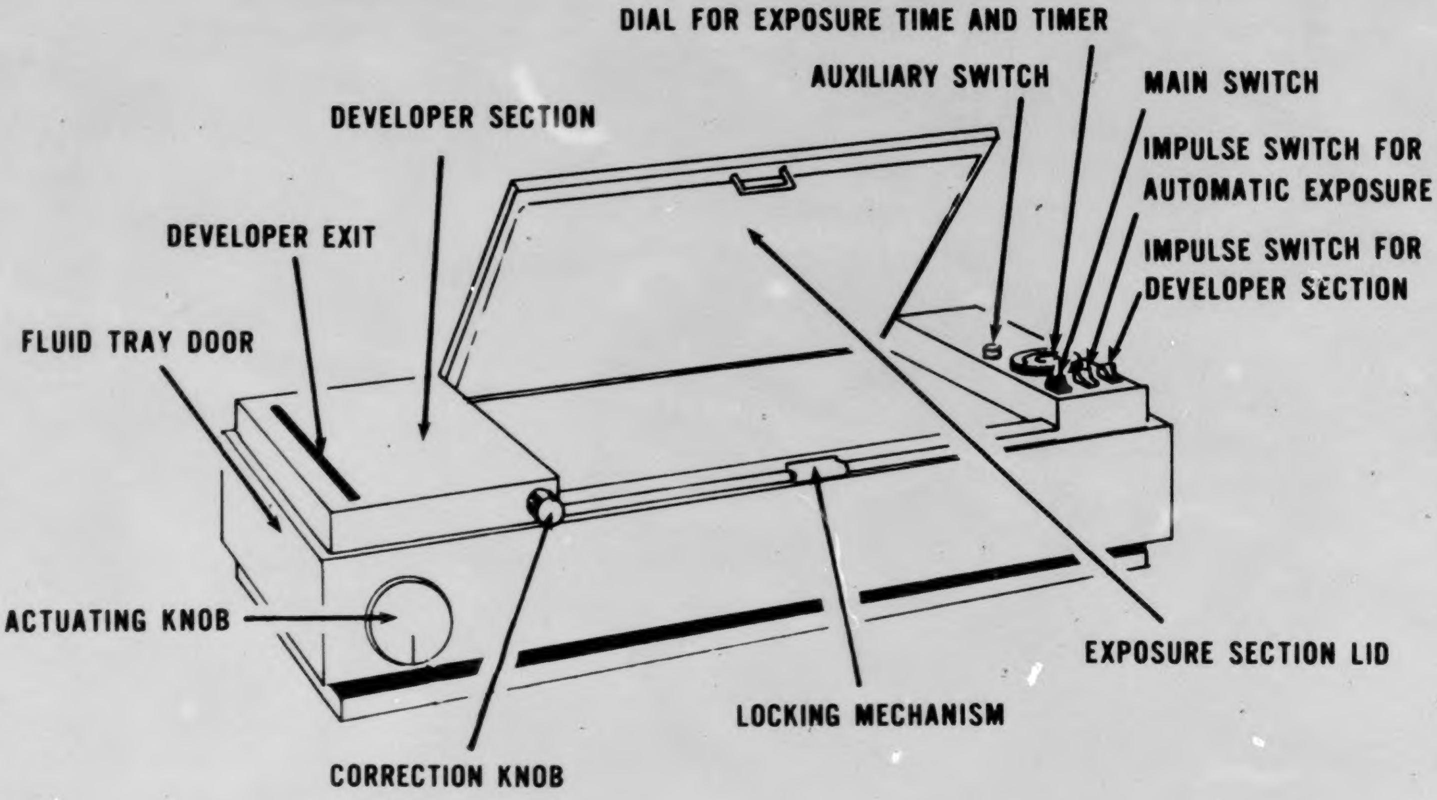
THE OFFSET SYSTEMS


DAMPENING SYSTEM
INKING SYSTEM
PLATE CYLINDER
MAIN PRINTING UNIT
BLANKET CYLINDER
IMPRESSION CYLINDER
REGISTER BOARD AND SHEET CONTROLS
FEED TABLE
DELIVERY SYSTEM

OFFSET DUPLICATOR PARTS


FEED ROLL PRESSURE ADJUSTMENT
COUNTER
INK FOUNTAIN CONTROL LEVER
VARIABLE SPEED CONTROL
VERTICAL COPY ADJUSTMENT LOCK KNOB
INK FOUNTAIN ROLLER KNOB
FORM ROLLER CONTROL KNOB(S)
OPERATION CONTROL LEVER
RECEIVING TRAY
FEED TABLE
AQUAMATIC CONTROL
FEED LEVER
LATERAL COPY ADJUSTMENT KNOB
IMPRESSION CYLINDER CONTROL KNOB
FEED TABLE RELEASE
FEED TABLE RAISING KNOB
MOTOR SWITCH

THE PLATEMAKER


DIAL FOR EXPOSURE TIME AND TIMER
AUXILIARY SWITCH
MAIN SWITCH
DEVELOPER SECTION
IMPULSE SWITCH FOR AUTOMATIC EXPOSURE
DEVELOPER EXIT
IMPULSE SWITCH FOR DEVELOPER SECTION
FLUID TRAY DOOR
ACTUATING KNOB
EXPOSURE SECTION LID
LOCKING MECHANISM
CORRECTION KNOB

UNIT IX

OFFSET DUPLICATION

JOB SHEET #1--PREPARE THE OFFSET MASTER

I. Tools, materials, and equipment required:

  A. Typewriter

  B. Carbon ribbon

  C. Soft, nongreasy offset eraser

  D. Offset master

  E. Material to be typed

II. Procedures

  A. Clean type faces on typewriter if dirty.

  B. Check to see if feed rolls and platen are free from smudges and deposits.

  C. Insert offset master in typewriter.

  (NOTE: The side on which guide markings are printed is the side on which typing should be done.)

  D. Type masters using a uniform touch.

  E. When correcting an error, erase the image with the eraser very lightly, only removing the carbon deposit on the master.

  F. Proofread typed material before removing it from typewriter.

  G. Remove typed material.

  H. Turn the machine off if you are using an electric typewriter.

  I. Store supplies.

UNIT IX

OFFSET DUPLICATION

JOB SHEET #2--OPERATE THE PLATEMAKER

I. Tools, equipment, and materials required:

   A. Offset plate

   B. Negative paper

   C. Fixer

   D. Lacquer

   E. Cotton swabs

   F. Cotton pads

   G. Platemaker

   H. Desensitizer

   I. Plate gum

II. Procedures:

   A. Photocopying Process

      (NOTE: These procedures are general. Follow specific instructions in operator's manual for particular model.)

      1. Set exposure dial control.

      2. Place negative, yellow side up, in machine.

      3. Place original face down on negative, making sure original is placed the right way.

      4. Close lid and turn on main switch.

      5. Press impulse switch for exposure.

      6. Remove original and turn negative face side down.

      7. Position plate, dull side up, on glass and align under separator.

      8. Place negative on top of plate, yellow side

down, sliding on top of separator.

9. Press switch for developer section.
10. Wait a set period of time and peel negative from plate.
11. Treat plate with fixer.
12. Treat plate with lacquer.
13. Rinse excess lacquer from plate with water.
14. Treat plate with perserving material if plate is not to be used right away.
15. Clean up area and store supplies.

B. Light Exposure Process

1. Set exposure controls.
2. Place prepared negative on top of metal offset plate.
3. Secure negative and plate firmly.
4. Expose to light about 3 minutes.
5. Remove the plate and negative from platemaker.
6. Wipe metal plate with desensitizer solution, using a cotton pad.
7. Develop plate with lacquer.
8. Rinse plate well.
9. Put thin coat of gum preserver on plate.

UNIT IX

OFFSET DUPLICATION

JOB SHEET #3--PROCESSING THE OFFSET PLATE

I. Tools, equipment, and materials required:

A. Metal and paper plates

B. Fixer

C. Cotton pads

D. Lacquer

E. Developer

F. Platemaker

G. Etching solution

II. Procedures:

(NOTE: These procedures are general. Follow the instructions in operator's manual for the model you are using.)

A. Processing metal plate

1. Place plate on glass surface or smooth plastic table top

2. Spread fixer smoothly over plate with cotton pad

3. After a few seconds, place lacquer in a non-image area of the plate

4. Wipe lacquer over copy area with a fresh cotton pad, moving from left to right with light strokes

5. Rinse plate with water right away

6. If wrong images are on plate, remove the images with a cotton pad moistened with developer solution

7. Store plate

B. Processing paper plate

1. Place plate on a glass surface or plastic table top
2. Pour etching solution onto the plate
3. With a clean cotton pad, rub solution over the entire surface of plate
4. Wipe plate with wet cotton pad before putting it on the offset machine

(NOTE: Be sure plate is still damp when attaching to the offset. If it has had time to dry, the ink will cover all areas.)

UNIT IX

OFFSET DUPLICATION

JOB SHEET #4--FILE AND STORE OFFSET MASTERS

I. Materials and equipment required:

A. Offset master

B. Offset duplicator

C. Cotton pad

D. Gum solution

E. Preserving solution

F. Water

G. Copy paper

II. Procedures:

A. After copies have been duplicated, run a few sheets of paper with form rollers away from master cylinder.

B. Remove master from cylinder.

C. Remove any ink or fountain solution on the master with the cotton pad moistened with water.

D. Apply a thin coat of diluted gum solution over master.

(NOTE: If corrections or additions are to be made on the master, apply a thin coat of preserving solution on master.)

E. Let master dry.

F. To store master, place a sheet of plain paper on both sides of the master.

G. Place master with sheets of paper flat in the original box.

H. Make sure storage area is cool and dry.

UNIT IX

OFFSET DUPLICATION

JOB SHEET #5--INK THE OFFSET DUPLICATOR

I. Tools, materials, and equipment required:

A. Fountain concentrate

B. Ink knife

C. Ink

D. Cotton pads

E. Water

F. Offset duplicator

II. Procedures:

(NOTE: These procedures are general. Follow specific instructions contained in operator's manual.)

A. Remove or secure loose jewelry, neckties, scarves, or other similar items

B. Don't let hair fall over shoulders

C. Move night latch to ink position

D. Position moisture (aquamatic) control to highest setting

E. Place ink in ink fountain

F. Rotate ink roller and adjust ink fountain screws

G. Rotate handwheel for ink roller to contact fountain roller

H. Move ink fountain control

I. Set or raise lockout lever

J. Turn machine to ON and allow time for even distribution of ink on rollers

K. Move ink fountain control to correct position

L. Raise or lower moisture lockout lever, depending on machine type

M. Move moisture control to OFF position and turn machine off

N. Fill fountain concentrate bottle and mix solution to correct amount of water and fountain concentrate

O. Place bottle in moisture unit

UNIT IX

OFFSET DUPLICATION

JOB SHEET #6--OPERATE THE OFFSET DUPLICATOR

I. Tools, materials, and equipment required:

A. Ink knife

B. Ink

C. Fountain solution

D. Copy paper

E. Cotton pads

F. Offset master

II. Procedures:

(NOTE: These procedures are general. Follow specific instructions contained in operator's manual.)

A. Remove or secure loose jewelry, necktie, scarves, or other similar items

B. Don't let hair fall over shoulders

C. Lower feed table

D. Load copy paper on feed table

E. Check or adjust feeding and receiving trap

F. Adjust feed roll pressure

G. Attach master (Moisten first if using a paper master.)

H. Moisten master

I. Turn machine to ON position

J. Move moisture control to desired setting

K. Move ink control and allow machine to run a few seconds

L. Set control lever to image position

M. Move control lever to feed position

N. Feed paper into the machine

O. Run test copy and make any necessary adjustments

P. Set counter

Q. Run desired number of copies

R. Move operation controls to NEUTRAL and feed additional blank paper

S. Turn machine to OFF

T. Remove master

U. Clean blanket and cylinder

UNIT IX

OFFSET DUPLICATION

JOB SHEET #7--CLEAN UP THE OFFSET DUPLICATOR

I. Tools, equipment, and supplies required:

A. Clean rags

B. Cleanup mats

C. Blanket and roller wash

D. Offset duplicator

E. Blanket wash

II. Procedures:

(NOTE: These procedures are general. Follow specific instructions for particular model contained in operator's manual.)

A. Remove extra paper

B. Remove fountain concentrate

C. Remove leftover ink from ink fountain

D. Remove ink fountain

E. Remove ductor roller

F. Clean ink fountain and ductor roller

G. Attach cleanup mat

H. Turn on machine to lowest speed

I. Turn moisture control to highest setting

J. Apply cleanup solution onto ink roller

K. Move control lever to ink and allow machine to run until clean up mat is coated with ink

(NOTE: More than on cleanup mat may be needed.)

L. Continue with Steps J and K until mats stay fairly clean

M. Turn moisture control to OFF position

N. Clean impression cylinder

O. Put roller conditioner on rollers

P. Turn machine to night latch position

Q. Clean moisture unit tray

R. Replace ink roller

S. Replace ink fountain

T. Move roller control to night latch position

U. Clean any ink from machine

V. Store supplies

UNIT IX

OFFSET DUPLICATION

UNIT TEST

1. Define the following terms.

   a. Offset plate -

   b. Offset duplicator -

   c. Platemaker -

   d. Plate (master) cylinder -

   e. Blanket cylinder -

   f. Impression cylinder -

2. Place a "✓" beside those statements that are true concerning the offset process.

____a. The offset process is based on the principle that oil and water mix.

____b. Copies on an offset duplicator are produced from metal or paper masters.

____c. A direct image is placed on the master which is attached to the plate cylinder.

____d. The water solution sticks to the part of the offset master which has images.

____e. Ink sticks to those areas on the offset master that have images.

____f. The image on the blanket cylinder is the reverse of the image on the plate cylinder.

____g. The impression cylinder presses a piece of clean copy paper against the blanket system.

3. List the names of the offset press systems.

   a.

   b.

   c.

   d.

   e.

4. Discuss the advantages and disadvantages of the offset.

   a. Advantages -

   b. Disadvantages -

5. Demonstrate the ability to:

   a. Prepare the offset master

b. Operate the platemaker

c. Process the offset plate

d. File and store offset masters

e. Ink the offset duplicator

f. Operate the offset duplicator

g. Clean the offset duplicator

(NOTE: If these activities have not been completed prior to the test, ask the instructor when they should be completed.)

UNIT IX

OFFSET DUPLICATION

ANSWERS TO UNIT TEST

1. a. Offset plate--Thin sheet of paper, plastic or metal which has a printing image

   b. Offset duplicator--Machine which transfers the image from a plate to paper

   c. Platemaker--Machine which photographs material onto an offset plate to be used for duplicating

   d. Plate (master) cylinder--Used to hold the offset plate in place and bring the plate into contact with the dampening rollers

   e. Blanket cylinder--Cylinder on the offset duplicator used to hold a rubber blanket which comes into contact with the inked image on the plate cylinder

   f. Impression cylinder--Cylinder which carries the paper inside the offset duplicator

2. _____ a.

   __✓__ b.

   __✓__ c.

   _____ d.

   __✓__ e.

   __✓__ f.

   __✓__ g.

3. a. dampening system

   b. inking system

   c. main printing unit

   d. feeding unit

   e. register board and sheet controls

   f. delivery system

4. a. Advantages
    - (1) Quality of the copy looks as good as the original
    - (2) Each copy is of the same high quality
    - (3) Printing can be done in color
    - (4) Many copies can be produced in a short period of time

   b. Disadvantages
    - (1) Equipment is more expensive than other forms of duplication
    - (2) Procedures in operating the machine are harder
    - (3) More expensive to keep up the machine
    - (4) Material costs are higher than for other types of duplicating machines

5. Evaluated to the satisfaction of the instructor

UNIT X

OPERATING ELECTRONIC CALCULATOR

UNIT OBJECTIVE

After completing this unit of instruction, the student should be able to identify keys on electronic calculators as well as the display functions and demonstrate the ability to solve mathematical problems using the touch method. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit, the student should be able to:

1. Match keys and display functions on the electronic calculator with their correct difinitions
2. Identify procedures in using the touch method
3. Label features of the electronic calculator
4. Demonstrate the ability to:
    a. Perform addition, substration, division, and multiplication problems on the electronic calculator
    b. Compute discounts, constants, and percentages on the electronic calculator

UNIT X

OPERATING ELECTRONIC CALCULATOR

SUGGESTED ACTIVITIES

I. Instructor:

   A. Provide objective sheet

   B. Discuss objective sheet

   C. Provide information sheet

   D. Discuss information sheet

   E. Make and show transparency

   F. Provide and discuss job sheets

   G. Assign additional exercises in applicable workbooks

   H. Give test and evaluate results

II. Student:

   A. Read objective sheet

   B. Study information sheet

   C. Discuss information sheet

   D. View transparency

   E. Complete assignment sheet

   F. Complete job sheets.

   G. Complete additional assigned exercises

   H. Take test

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

C. Transparency master--XII-TM-1--The Electronic Calculator

D. Assignment Sheet #1--Identifying Parts of the Electronic Calculator

E. Job sheets

1. Job Sheet #1--Adding on the Electronic Calculator
2. Job Sheet #2--Adding Numbers Using Non-Add and Sub-total Keys
3. Job Sheet #3--Subtracting Numbers on the Electronic Calculator
4. Job Sheet #4--Multiplying Numbers on the Electronic Calculator
5. Job Sheet #5--Dividing Numbers on the Electronic Calculator
6. Job Sheet #6--Computing Discounts on the Electronic Calculator
7. Job Sheet #7--Multiplying Using Constants
8. Job Sheet #8--Computing Percentages on the Electronic Calculator

F. Answers to job sheets

G. Unit test

H. Answers to unit test

II. References:

A. Albertson, Dorothy. Business Machines Practice Set. New York, N.Y.: McGraw-Hill Book Company, 1974.

B. Cornelia, Nicholas J. and others. Office Machines Course. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1971.

C. Meehan, James and Allan Doerr. Solving Business Problems on the Electronic Calculator. New York, N.Y.: McGraw-Hill Book Company, 1975.

D. Pasewark, William R. Electronic Display Calculator. Cincinnati, Ohio: South-Western Publishing Co., 1975.

E. Victor Programable Electronic Printing Calculator Programming Manual. Chicago, Illinois: Victor Comptometer Corporation, Inc., 1973.

UNIT X

OPERATING ELECTRONIC CALCULATOR

INFORMATION SHEET

I. Parts of a calculator with memory

A. Switch--Control located either on the right or left side which turns calculator ON and OFF

B. Keys

1. $\boxed{0}$ - $\boxed{9}$ keys--Enter numbers (limit 8 digits)

2. $\boxed{.}$ key--Enters a decimal point

3. + key--Instructs calculator to add the previous number or result to the following number

4. $\boxed{-}$ key--Instructs calculator to subtract the following number from the previous number or result

   (NOTE: Puts a negative sign to the following number when used after an [x] or [÷] key. Repeated depressions continue to subtract the last number entered from the result.)

5. $\boxed{x}$ key--Instructs calculator to multiply the previous number or result by the following number

6. $\boxed{\div}$ key--Instructs calculator to divide the previous number or result by the following number

7. $\boxed{=}$ key--Instructs calculator to complete the previously entered operations to provide the total

8. $\boxed{C}$ key--Clears (erases) information in calculator and display and sets calculator to zero

9. $\boxed{CE}$ key--Clears the calculator and display of the last keyboard entry unless a function--[+], [-], [X], [÷], [%]--key has been pressed.

10. $\boxed{\%}$ key--Calculates percentages of numbers

    (NOTE: When used with the [X] or [+] keys, the [%] key computes add-on percentages such as taxes and totals. With the [-] key, the [%] key computes discounts and totals.)

11. $\boxed{M+}$ key--Adds displayed number to memory

12. $\boxed{M-}$ key--Subtracts displayed numbers from memory

13. $\boxed{MR}$ key--Recalls number in memory to display

14. $\boxed{MC}$ key--Clears only the memory

    (NOTE: Memory functions--add to, subtract from, or clear the memory without affecting the displayer number or calculation in progress.)

C. Display

1. Power on indication--The presence of digits in the display is indication that power is ON

2. Minus sign--Appears at the left of displayed number to indicate negative numbers

3. Decimal point

    a. Automatically appears to the right of any number entered unless positioned in another sequence by use of [.] (period) key.

       (NOTE: A zero will come before the decimal for decimal numbers.)

    b. The calculator automatically positions the decimal to display the most significant digits of the result

4. Calculation overflow

    a. When a result is more than eight digits, the sign [may show at the left of the display and the calculator will not accept any key instructions except the [C] or [CE] key

       (NOTE: To determine the correct placement the decimal, move the decimal point eight places to the right. Pressing the [C] key will clear the number and the overflow condition from the calculator. Pressing the [CE] key will clear the number.)

b. Some calculators may show a flashing number on the display screen to indicate that the result has more than eight digits to the left of the decimal

(NOTE: The calculator will not accept CE or C. Press CE* to clear only the overflow condition. The displayed number will remain with the decimal shifted eight places to the left of its original position. To determine the correct placement of the decimal, mentally move it eight places to the right. Press C* to clear all numbers and the overflow condition from the calculator.)

5. Automatic constant--Addition, subtraction, multiplication, or division with a constant number is automatic

(NOTE: The first number entered in multiplication will be constant. The second number entered in the other three functions will be constant.)

6. Decimal alignment--In addition or subtraction problems, the calculator will display as many decimal places in a result as are contained in the entry with the most decimal places

Example: The result of the problem 1,273 - .203 is displayed as 1.070 instead of 1.07. This decimal alignment is maintained in addition and subtraction results until [C] is used or a number with more decimal places is entered.

7. Change sign--The [CS] key changes the sign of the displayed number

(NOTE: Used for entering negative numbers.)

8. Memory overflow--The display flashes when the memory total exceeds eight digits, and the calculator will not accept further entries. Press C* twice to clear calculator. Press MC* CE* to clear memory but retain the displayed number

*Hold key down for a second

II. Using the touch system

A. Position and posture

1. Sit erect with the machine either slightly to the right or left of the body

2. Use the preferred hand to operate the machine

3. Use the other hand for handling papers

B. Clearing the machine

1. Make sure there are no numbers in the machine from the past calculations by depressing the total key

2. When machine has been cleared, a symbol similar to one of the following should appear on the tape or display window: T, *, [], or 0.

C. Entering and printing numbers

1. Operate the keyboard with the first three fingers and thumb of the right hand

2. Rest the index finger on the 4 key, the middle finger on the 5 key, and the ring finger on the 6 key--home position

3. Use the index finger to depress the 4, 7, and 1 keys

4. Use the middle finger to depress the 5, 8, and 2 keys

5. Use the ring finger to depress the 6, 9, and 3 keys

6. Use the thumb to depress the zero key

7. Use the little finger to depress the plus, minus, subtotal, non-add, and total keys

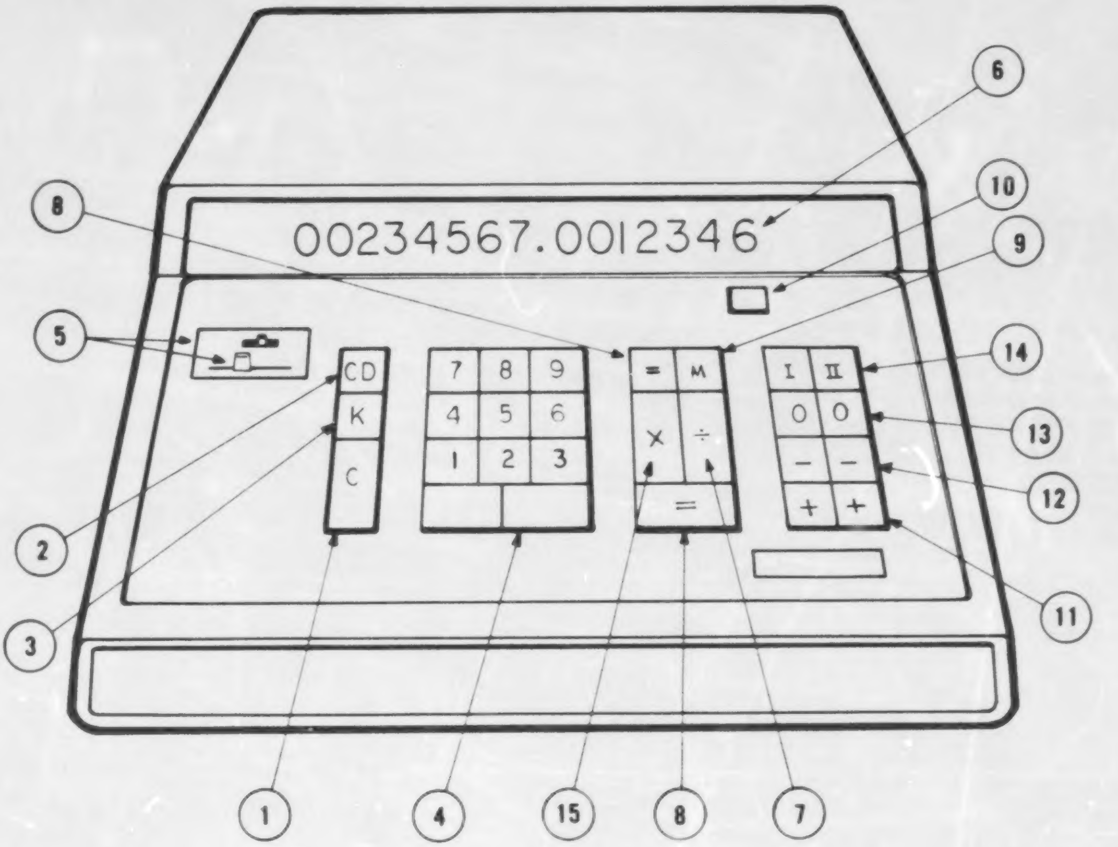
8. Also use the index finger to depress any of the other operational keys located on the left of the machine

9. From the home position, move the fingers either up or down to strike the other keys

10. To enter a number into the machine, depress the keys reading from left to right

11. To print the number after it has been entered, press down on the key for the operation indicated in the problem

THE ELECTRONIC CALCULATOR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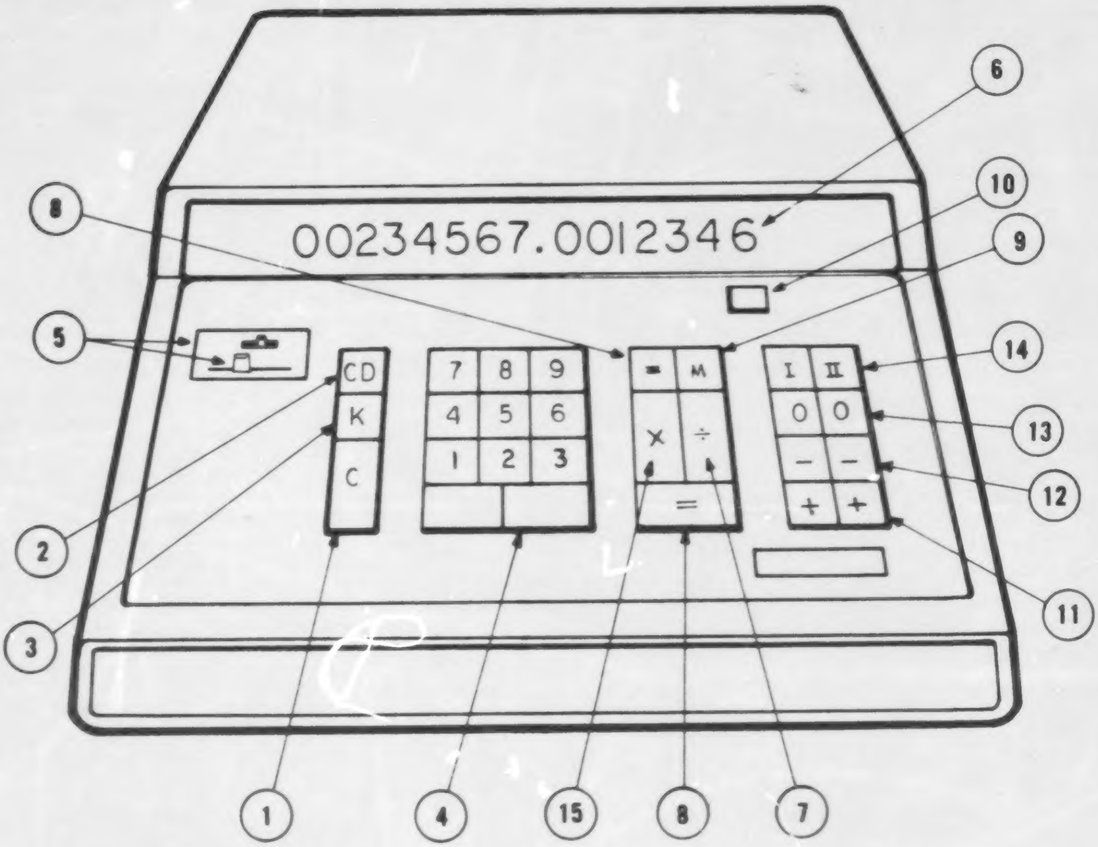
1. All Clear
2. Clear Display Key
3. Constant Key or Switch
4. Decimal Point Key
5. Decimal Point Selector
6. Display Screen
7. Division Key
8. Equals Key
9. From Memory
10. Memory Light
11. Memory Plus Key
12. Memory Minus Key
13. Memory Subtotal Keys
14. Memory Total Keys
15. Multiplication Key

UNIT X

OPERATING ELECTRONIC CALCULATOR

ASSIGNMENT SHEET #1--IDENTIFYING FEATURES OF THE ELECTRONIC CALCULATOR

Directions: Label the parts of the electronic calculator by placing the number of the part next to the correct term in the blanks on the following page.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8
9
5
14
13
12
11
2
3
CD
K
C
7 8 9
4 5 6
1 2 3
M
×
÷
=
I
II
0 0
– –
+ +
1
4
15
8
7

_____ decimal point selector

_____ memory plus key

_____ multiplication key

_____ equals key

_____ division key

_____ clear display key

_____ from memory

_____ display screen

_____ memory light

_____ decimal point key

_____ constant key

_____ memory total keys

_____ memory subtotal keys

_____ memory minus key

_____ all clear

UNIT X

OPERATING ELECTRONIC CALCULATOR

ANSWERS TO ASSIGNMENT SHEET #1

__5__ decimal point selector
__11__ memory plus key
__15__ multiplication key
__8__ equals key
__7__ division key
__2__ clear display key
__9__ from memory
__6__ display screen
__10__ memory light
__4__ decimal point key
__3__ constant key
__14__ memory total keys
__13__ memory subtotal keys
__12__ memory minus key
__1__ all clear

UNIT X

OPERATING ELECTRONIC CALCULATOR

JOB SHEET #1--ADDING ON ELECTRONIC CALCULATOR

I. Tools and equipment needed:

- A. Electronic calculator
- B. Pencil to write answers

II. Procedures: (NOTE: These procedures may change with each brand of machine.)

- A. Clear the machine. Look for the clear symbol on the tape or display window
- B. Place fingers on the home row (4,5,6 keys)
- C. Enter the first amount, reading numbers from left to right
- D. Print the amount by depressing PLUS or ADD key
- E. Enter the second amount by depressing and releasing the keys reading from left to right
- F. Print amount by depressing the PLUS or ADD key
- G. Enter and print remaining numbers in the same way until all numbers in the problem have been entered and printed
- H. Take a total by depressing the TOTAL key

PROBLEMS

Home Row (4,5,6)

1.	2.	3.	4.
546	645	546	654
565	546	645	564
456	456	654	456
645	645	465	645
564	564	664	546

Top Row (7,8,9)

1.	789	2.	585	3.	696	4.	789
	879		885		858		465
	978		696		747		945
	474		669		956		876
	744		477		845		598

Bottom Row (1,2,3 and 0)

1.	414	2.	221	3.	103	4.	592
	302		532		320		863
	103		612		410		230
	321		406		632		703
	123		300		132		961

UNIT X

OPERATING ELECTRONIC CALCULATOR

JOB SHEET #2--ADDING NUMBERS USING NON-ADD AND SUB TOTAL KEYS

I. Tools and supplies required:

A. Electronic calculator

B. Pencil to write answers

II. Procedures: (NOTE: These procedures may change with each brand of machine.)

A. Using subtotal key

1. Clear the machine
2. Enter and print the first number
3. Enter and print second number (or more as indicated in problem)
4. Obtain a subtotal by depressing the SUBTOTAL key
5. Enter and print remaining numbers
6. Take a total. When total is printed, machine is cleared.

(NOTE: All electronic calculators do not have subtotal or non-add keys.)

PROBLEMS

Subtotals - S indicates subtotal

1. 542
110
691
963
S
400
751
982
522
T

2. 581
639
250
226
S
982
453
815
592
T

3. 200
275
903
S
772
955
307
S
398
123
T

4. 714
558
399
278
S
162
871
883
259
T

B. Using non-add key

1. Clear the machine
2. Enter the amount to be used to identify the problem
3. Depress the NON-ADD key to print the number on the tape
4. Enter and print the remaining numbers of the problem
5. Take a total in the usual way. The total will not contain the amount to identify the problem

PROBLEMS

N indicates non-add

1.	2.	3.	4.
954	77	865	90
989	318	693	283
456	60N	724N	504N
768N	245	421	67
346	763	312	431N
8	974N	564	298
29	866	28	875
138	504	30	380
T	T	T	T

UNIT X

OPERATING ELECTRONIC CALCULATOR

JOB SHEET #3--SUBTRACTING NUMBERS ON ELECTRONIC CALCULATOR

I. Tools and equipment needed:

  A. Electronic calculator

  B. Pencil to write answers

II. Procedures: (NOTE: These procedures may change with each brand of machine.)

  A. Simple subtraction

    1. Clear the machine

    2. Enter the amount to be added on the keyboard.

    3. Print the amount to be added by depressing the PLUS key

    4. Enter the amount to be subtracted on the keyboard

    5. Print the amount to be subtracted by depressing the MINUS key

    6. Take a total

PROBLEMS

1. 47.56
-26.10

2. 87
-36

3. 12,468
-10,312

4. 653
-276

5. 754
-470

6. 773
815
-695
170
-186

(NOTE: To correct errors by subtraction--use the clear display key before the numbers are printed on the tape. If the numbers are on the tape, reenter the wrong number and subtract if the incorrect amount was added. If the wrong amount was subtracted, reenter the wrong amount on the keyboard and add.)

B. Credit or negative balances--when the amount subtracted is larger than the amount added (indicated by either a red total or a number with a minus sign before it on the display) record total with CR.

1. Clear the machine

2. Enter and print the amount to be added

3. Enter and print amount to be subtracted

4. Take a total

PROBLEMS

1. 463
   -697

2. 364
   -768

3. 726
   -954

4. 321
   -654

5. 830
   -1,936

6. 896
   632
   84
   -698
   82
   -896
   63
   -986

UNIT X

OPERATING ELECTRONIC CALCULATOR

JOB SHEET #4--MULTIPLYING NUMBERS ON THE ELECTRONIC CALCULATOR

I. Tools and equipment needed:

A. Electronic calculator

B. Pencil to write results

II. Procedures: (NOTE: These procedures may change with each brand of machine.)

A. Clear the machine

B. Enter top number (multiplicand)

C. Register top number. Depress x key.

D. Enter bottom row numbers (multiplier) and depress = key

E. Record answer

F. Clear machine

PROBLEMS

1. 134
x 32

2. 721
x 8

3. 637
x 411

4. 845
x 43

5. 809
x 120

6. 63.2
x 2.5

7. 43.66
x .53

8. 16.306
x 4. 08

UNIT X

OPERATING ELECTRONIC CALCULATOR

JOB SHEET #5--DIVIDING NUMBERS ON ELECTRONIC CALCULATOR

I. Tools and equipment needed:

  A. Electronic calculator

  B. Pencil to record results

II. Procedures: (NOTE: These procedures may vary with each brand of machine.)

  A. Clear machine

  B. Enter dividend

  C. Register dividend with [÷] key

  D. Enter divisor on keyboard

  E. Obtain answer on tape or display window with [=] key

  F. Record answer

  G. Clear machine

PROBLEMS

Round off answers to two decimal places

1. 144÷12=
2. .625÷5=
3. 1,728÷144=
4. 1,725÷25=
5. 3,136÷14=
6. 1,344÷28=
7. 486÷46=
8. 7,643÷53=
9. 360÷18=
10. 50.16÷4=

UNIT X

OPERATING ELECTRONIC CALCULATOR

JOB SHEET #6--COMPUTING DISCOUNTS ON THE ELECTRONIC CALCULATOR

I. Tools and equipment needed:

  A. Electronic calculator

  B. Pencil to record answers

II. Procedures: (NOTE: These procedures may vary with each brand of machine.)

  A. Clear machine

  B. Enter original amount

  C. Register amount by depressing X key

  D. Enter discount percent

  E. Find discount by depressing = key

  F. Record discount amount

  G. Obtain net amount by subtracting discount amount from original amount

  H. Record net amount

  I. Clear machine

PROBLEMS

	Amount of Discount	Net Amount
1. 863.72 less 2%		
2. 761.29 less 11%		
3. 936.42 less 9%		
4. 1,627.99 less 67%		
5. 27.16 less 3%		

UNIT X

OPERATING ELECTRONIC CALCULATOR

JOB SHEET #7--MULTIPLYING USING CONSTANTS

I. Tools and equipment needed:

- A. Electronic calculator
- B. Pencil to write answers

II. Procedures: (NOTE: These procedures may vary with each brand of machine.)

- A. Clear machine and use procedures to complete the problems below
- B. Enter constant number and depress X key

  (NOTE: On some machines you enter the constant key first.)
- C. Enter non-constant number and strike = key
- D. Obtain and record answer
- E. Enter next non-constant number and strike = key
- F. Continue until problem is completed

PROBLEMS

1. Payroll

Jones	36 hrs.	@	$2.30/hr.
Jackson	33 hrs.	@	2.30/hr.
James	27 hrs.	@	2.30/hr.
Jamison	40 hrs.	@	2.30/hr.
Jennings	39 hrs.	@	2.30/hr.

2. Sales Slip

6 yards @ $3.99/yard

3 yards @ 3.99/yard

70 yards @ 3.99/yard

100 yards @ 3.99/yard

16 yards @ 3.99/yard

UNIT X

OPERATING ELECTRONIC CALCULATOR

JOB SHEET #8--COMPUTING PERCENTAGES ON THE ELECTRONIC CALCULATOR

I. Tools and equipment needed:

A. Electronic calculator

B. Pencil to write results

II. Procedures: (NOTE: These procedures may vary with each brand of machine.)

A. Finding "markup" price--To find percentage of markup price, in percent add percent of markup to cost percent (100%).

Example: 15% markup--15% + 100% = 115% or 1.15

1. Clear machine
2. Enter cost of article
3. Register cost by depressing X key
4. Enter decimal percentage of markup
5. Register percentage of markup by striking = key
6. Obtain and record answer

B. Finding "markdown" price--Subtract percent of markdown from selling price (100%).

Example: 25% markdown--25% from 100%=75% or .75 in decimals

1. Clear machine
2. Enter selling price
3. Register selling price by depressing X key
4. Enter markdown percent
5. Register markdown by striking = key
6. Obtain and record answer

C. Finding amount of commission--To find sales commission, convert commission percent to decimals. Change fractions to decimals and move decimal point two places to the left.

1. Clear machine
2. Change percent to decimal equivalent
3. Multiply amount of sales by the commission percent decimal
4. Round off answer to two decimal places

PROBLEMS

Markup

	Cost of Article	% of Markup	Markup Price
1.	$26.13	13%	
2.	162.36	92%	
3.	117.77	14%	
4.	93.66	16%	

Mark Down

	Selling Price	% of Markdown	Markdown Price
1.	$69.69	25%	
2.	199.95	33%	
3.	206.66	10%	
4.	576.42	50%	

Sales Comission

Individual	Sales	% of Commission	Commission Earned
Jackson	$6,246.82	5%	
Jones	543.61	10%	
Wilson	1,216.66	8%	
Smith	4,512.44	16%	

UNIT X

OPERATING ELECTRONIC CALCULATOR

ANSWERS TO JOB SHEETS

Job Sheet #1

Home Row

1. 2776 2. 2856 3. 2974 4. 2865

Top Row

1. 3864 2. 3312 3. 4102 4. 3673

Bottom Row

1. 1263 2. 2071 3. 1597 4. 3349

Job Sheet #2

Subtotals:

1. 2306S 4961T
2. 1696S 4538T
3. 1378S 3412S 3933T
4. 1698S 3873T

Non-Add:

1. 2061T 2. 2773T 3. 2913T 4. 1993T

Job Sheet #3

A. Simple subtraction

1. 21.46 2. 51 3. 2156 4. 377 5. 284 6. 877

B. Credit balance

1. 234CR 2. 404CR 3. 228CR

4. 333CR 5. 1106CR 6. 823CR

Job Sheet #4

1. 4288 2. 5768 3. 261,807 4. 36,335

5. 97.080 6. 158 7. 110.4598 8. 78.2688

Job Sheet #5

1. 12 2. 125 3. 12 4. 69 5. 224

6. 48 7. 10.565 8. 144.21 9. 20 10. 1254

Job Sheet #6

	Amount of Discount	Net Amount
1.	17.27	846.45
2.	83.74	677.54
3.	84.28	852.14
4.	1090.75	359.75
5.	.81	26.34

Job Sheet #7

1. Payroll	2. Sales Slip
$82.80	$ 23.94
75.90	11.97
62.10	279.30
92.00	399.00
89.70	63.84

Job Sheet #8

Markup Price

1. $ 29.52
2. 311.73
3. 134.26
4. 108.65

Markdown Price

1. $ 52.26
2. 127.97
3. 185.99

4. 288.21

Sales Commission

Jackson	$312.34
Jones	54.36
Wilson	97.33
Smith	721.99

UNIT X

OPERATING ELECTRONIC CALCULATOR

UNIT TEST

1. Match the names of the major keys of the electronic calculator with their descriptions by placing the correct letter in the space provided.

   a. Electronic printing

_____ 1. [0]-(9)

_____ 2. (.)

_____ 3. (+)

_____ 4. (-)

_____ 5. (X)

_____ 6. (÷)

_____ 7. (=)

_____ 8. (C)

_____ 9. (CE)

_____ 10. (%)

_____ 11. (M+)

_____ 12. (M-)

_____ 13. (MR)

_____ 14. (MC)

a. Instructs calculator to subtract the following number from the previous number

b. Instructs calculator to add the previous number or result to the following number

c. Clears (erases) information in calculator and display and sets calculator to zero to start new problem

d. Adds displayed number to memory

e. Enters numbers (limit 8 digits)

f. Clears the calculator and display of the last keyboard entry unless a function key has been pressed

g. Clears only the memory

h. Instructs calculator to divide the previous number or result by the following number

i. Enters a decimal point

j. Used to find percentage of number

k. Instructs calculator to multiply the previous number or results by the following number

l. Subtracts displayed number from memory

m. Recalls number in memory to display

n. Instructs calculator to complete previously-entered operation for result

b. Display calculators

____1. Power on indication

____2. Minus sign

____3. Decimal point

____4. Automatic constant

____5. Decimal alignment

____6. Change sign

____7. Calculation overflow

____8. Memory overflow

a. Presence of digit in the display is indication that power is on

b. A flashing display indicating result is more than eight digits to the left of the decimal

c. Changes the sign of the displayed number

d. Flashes when memory total is more than eight digits

e. Appears at left of displayed number to indicate negative numbers

f. Display in a result as many decimal places as are contained in the entry with the most decimal places

g. Automatically appears to the right of any number entered unless (.) key is used

h. Addition, subtraction, multiplication, or division with a constant number is automatic

2. Place a (✓) beside those statements that are true concerning the touch method.

____a. Machine is slightly to the left of the body

____b. The left hand is used for handling paper

____c. The total key clears the machine

____d. Keyboard is operated with first three fingers and thumb of left hand

____e. The index finger depresses the 4, 7 and 1 keys

____f. The thumb is used to depress the 0 key

____g. From the home position, the fingers move sideways to strike the other keys

____h. To enter a number into the machine, depress the keys reading from left to right

3. Label features of the electronic calculator

4. Demonstrate the ability to:

a. Perform addition, subtraction, division, and multiplication problems on the electronic calculator

b. Compute discounts, constants and percentages on the electronic calculator

(NOTE: If activities #3 and #4 have not been completed prior to the test, ask the instructor when they should be completed.)

[illegible]T X

OPERATING ELECTRONIC CALCULATOR

ANSWERS TO UNIT TEST

1. a.
e 1.
i 2.
b 3.
a 4.
k 5.
h 6.
n 7.
c 8.
f 9.
j 10.
d 11.
l 12.
m 13.
g 14

b.
a 1.
e 2.
h 3.
j 4.
i 5.
f 6.
c 7.
g 8.
b 9.
d 10.

2.
___ a.
✓ b.
✓ c.
___ d.
✓ e.
✓ f.
___ g.
✓ h.

3. Evaluated to the satisfaction of the instructor

4. Evaluated to the satisfaction of the instructor

UNIT XI

OPERATING CALCULATING MACHINES

UNIT OBJECTIVE

After completing this unit, the student should be able to define terms associated with calculating machines, identify the different keys and their functions, and be able to operate the ten-key adding machine and the mechanical printing calculator. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student should be able to:

1. Define terms associated with the ten-key adding machine
2. Match major keys with their functions
3. Explain the difference between a ten-key adding machine and a mechanical printing calculator
4. Identify procedures involved in using the machines
5. Explain the use of decimal equivalents
6. Locate parts on a ten-key adding machine
7. Locate parts on a mechanical printing calculator
8. Demonstrate the ability to:
    a. Use the ten-key adding machine
    b. Add on the ten-key adding machine
    c. Subtract on the ten-key adding machine
    d. Use non-add key on the ten-key adding machine
    e. Use repeat key on ten-key adding machine
    f. Use subtotal key on ten-key adding machine
    g. Find the decimal equivalents for fractions

h. Multiply, using the decimal equivalents for fractions

i. Multiply, using the mechanical printing calculator

j. Divide automatically, using the mechanical printing calculator

UNIT XI

OPERATING CALCULATING MACHINES

SUGGESTED ACTIVITIES

I. Instructor

- A. Provide student with objective sheet
- B. Provide student with information and job sheets
- C. Discuss unit and specific objectives
- D. Discuss information sheet
- E. Make transparencies
- F. Demonstrate and discuss the procedures outlined on the job sheets
- G. Give test

II. Student

- A. Read objective sheets
- B. Study information sheet
- C. Demonstrate the ability to perform the procedures outlined on the job sheets
- D. Take test

INSTRUCTIONAL MATERIALS

I. Included in this unit

- A. Objective sheet
- B. Information sheet
- C. Transparency masters
  1. XI-TM-1--Ten-Key Adding Machine
  2. XI-TM-2--Mechanical Printing Calculator
  3. XI-TM-3--Home Key Position

D. Job Sheets

1. Job Sheet # 1--Use Ten-Key Adding Machine
2. Job Sheet # 2--Add on the Ten-Key Adding machine
3. Job Sheet #3--Subtract on the Ten-Key Adding Machine
4. Job Sheet #4--Use Non-Add Key on the Ten-Key Adding Machine
5. Job Sheet #5--Use Repeat Key on the Adding Machine
6. Job Sheet #6--Use Sub-Total Key on the Adding Machine
7. Job Sheet #7--Find the Decimal Equivalents for fractions
8. Job Sheet #8--Multiply, using the "Decimal Equivalent Chart" for Fractions
9. Job-Sheet #9--Multiply, using the Mechanical Printing Calculator
10. Job Sheet #10--Divide Automatically, using the Mechanical Printing Calculator

E. Answers to job sheets

F. Unit test

G. Answers to unit test

II. References

A. Cornelia, Nicholas J. and others. Office Machines Course. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1971

B. Dool, J. H. Business Machine Exercises. New York: Gregg Division, McGraw-Hill Book Company, 1964.

C. Fasnacht, Harold E. and others. How to Use Business Machines.

D. Pasewark, William and others. Ten-Key Adding Listing Machine Course. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

E. Walker, Arthur L. and others. How to Use Adding And Calculating Machines. 3rd ed. New York: Gregg Division, McGraw-Hill Book Company, 1967.

UNIT XI

OPERATING CALCULATING MACHINES

INFORMATION SHEET

I. Terms and definitions

- A. Ten-key machine--Machine which contains one number entry key for each of the digits 1-9, plus the 0, along with common operation keys
- B. Listing--Process by which each set of numbers is printed on a paper tape
- C. Indexing a number--Term used when placing a number on the keyboard
- D. Home position--The starting position from which the fingers move to strike all of the other keys
- E. Touch system--Using keys by touch rather than sight

II. Ten-Key Adding Machine Keys

- A. Add key--Identified by (+) symbol and used to index numbers to be added
- B. Subtract key--Identified by (-) symbol and used to index numbers to be subtracted
- C. Repeat key--Identified by X symbol and used to set machine to do multiplication
- D. Sub-total key--Identified by S symbol and is used to provide a partial total if needed
- E. Non-add key--Identified by N or # symbol and used to record a number that is not to be included in the total
- F. Clear key--Identified by C and clears an incorrect entry on the keyboard
- G. Total key--Identified by the symbol T and recalls the sum from the machine and prints the total on the paper tape

III. Types of Machines

A. Ten-key adding machine

1. Most often used in offices where there is little need for work in multiplication and division

2. Less expensive than the automatic and mechanical printing calculator

3. Prints on a tape to allow checking the math work done

B. Ten-key mechanical printing calculator

1. Can be used for many kinds of office work

2. Can multiply and divide quickly and automatically

3. Also prints on a paper tape to allow checking math work done

IV. Learning the System

A. Postion and posture

1. Sit erect, with the machine placed slightly to the right of the body.

2. If right handed, use the right hand for operating the machine, and the left if left handed

3. Handle papers with the other hand

B. Clearing the machine for use

1. Make sure there are no numbers in the machine by the following methods:

a. On a manual machine, depress the total key and pull the operating handle toward you.

b. On an electric machine, press the total key, or the total and plus key twice.

2. When machine has been cleared, a symbol, such as T, *, or ▱, will appear.

V. Decimal Equivalents

  A. Used when working with fractional numbers

  B. Convert fractions to the corresponding decimals

  C. Decimal equivalent chart (following page)

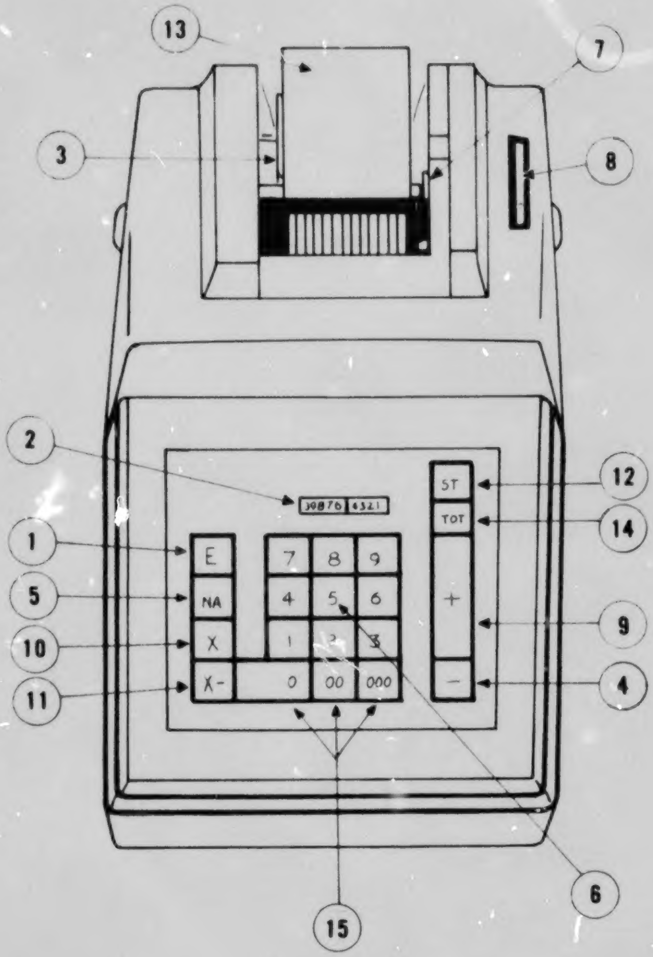
DECIMAL EQUIVALENTS OF FRACTIONS

NUMERATORS

DENOMINATORS

	1/—	2/—	3/—	4/—	5/—	6/—	7/—	8/—
—/3	.33333	.66667						
—/4	.25	.5	.75					
—/5	.2	.4	.6	.8				
—/6	.16667	.33333	.5	.66667	.83333			
—/7	.14286	.28571	.42857	.57143	.71429	.85714		
—/8	.125	.25	.375	.5	.625	.75	.875	
—/9	.11111	.22222	.33333	.44444	.55556	.66667	.77778	.88889
—/10	.1	.2	.3	.4	.5	.6	.7	.8
—/11	.09091	.18182	.27273	.36364	.45455	.54545	.63636	.72727
—/12	.08333	.16667	.25	.33333	.41667	.5	.58333	.66667

TEN-KEY ADDING MACHINE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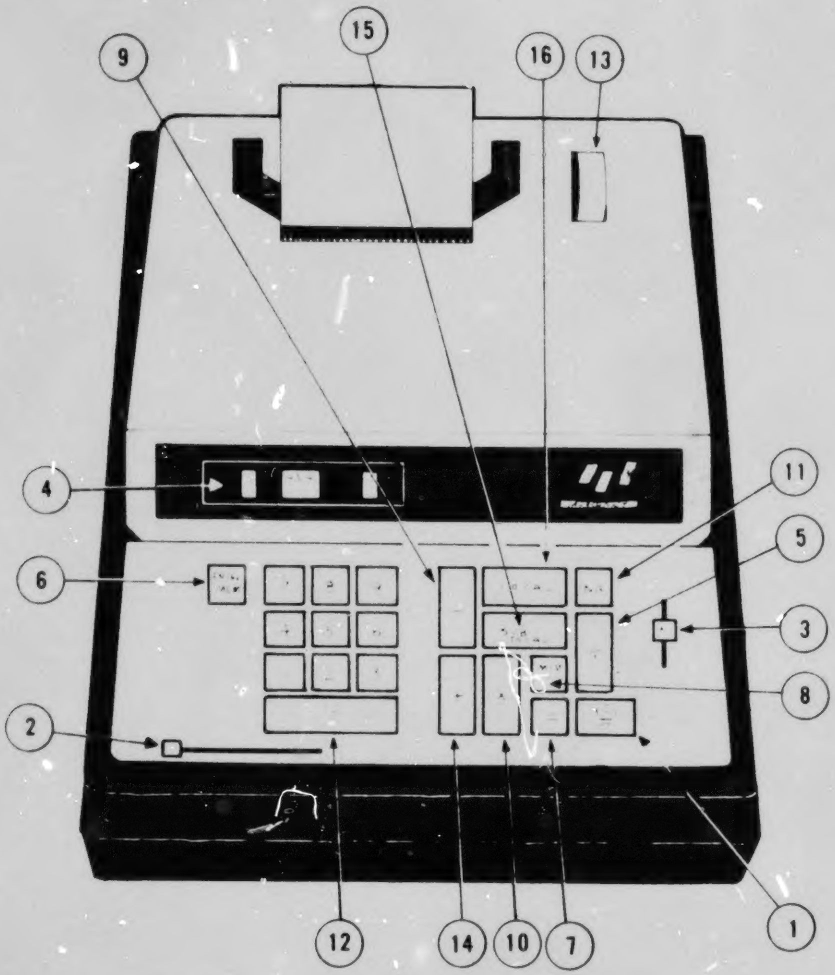
1 Clear Key (Lever)
2 Digit Indicator
3 Line Space Selector
4 Minus Bar (Key)
5 Non-Add Key
6 Numerical Keys
7 Paper Release Lever
8 Platen Knob
9 Plus Bar
10 Repeat Key
11 Repeat Subtract Key
12 Subtotal Key
13 Tape
14 Total Bar (Key)
15 Zero Keys

TM-1

MECHANICAL PRINTING CALCULATOR



1 Accumulation Equals Key

2 Clear Entry Key

3 Decimal Selector

4 Digit Indicator

5 Division Key

6 Enter Memory Key

7 Equals Key

8 Memory Recall Key

9 Minus Key

10 Multiplication Key

11 Non-Add Key

12 Number Keys

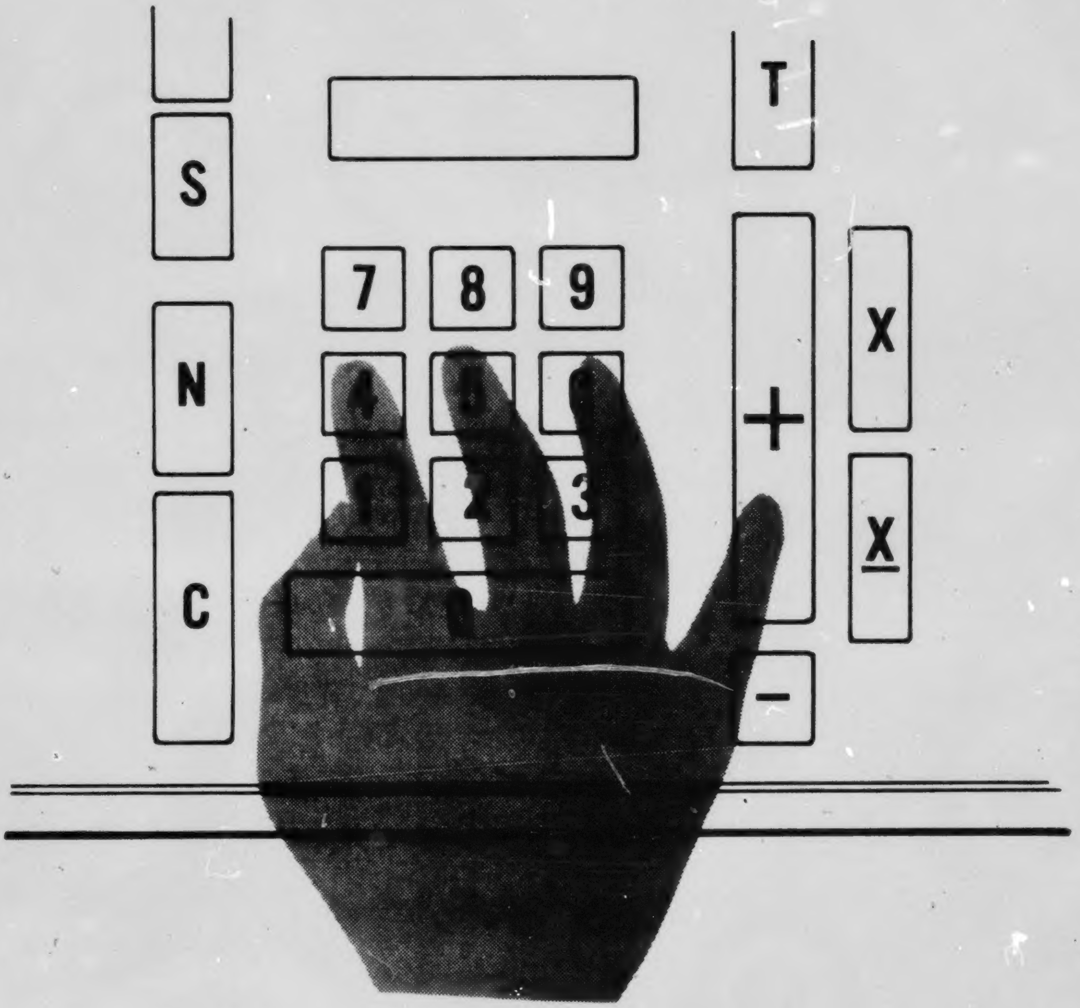
13 Platen Knob

14 Plus Key

15 Subtotal Key

16 Total Key

HOME KEY POSITION
Right Hand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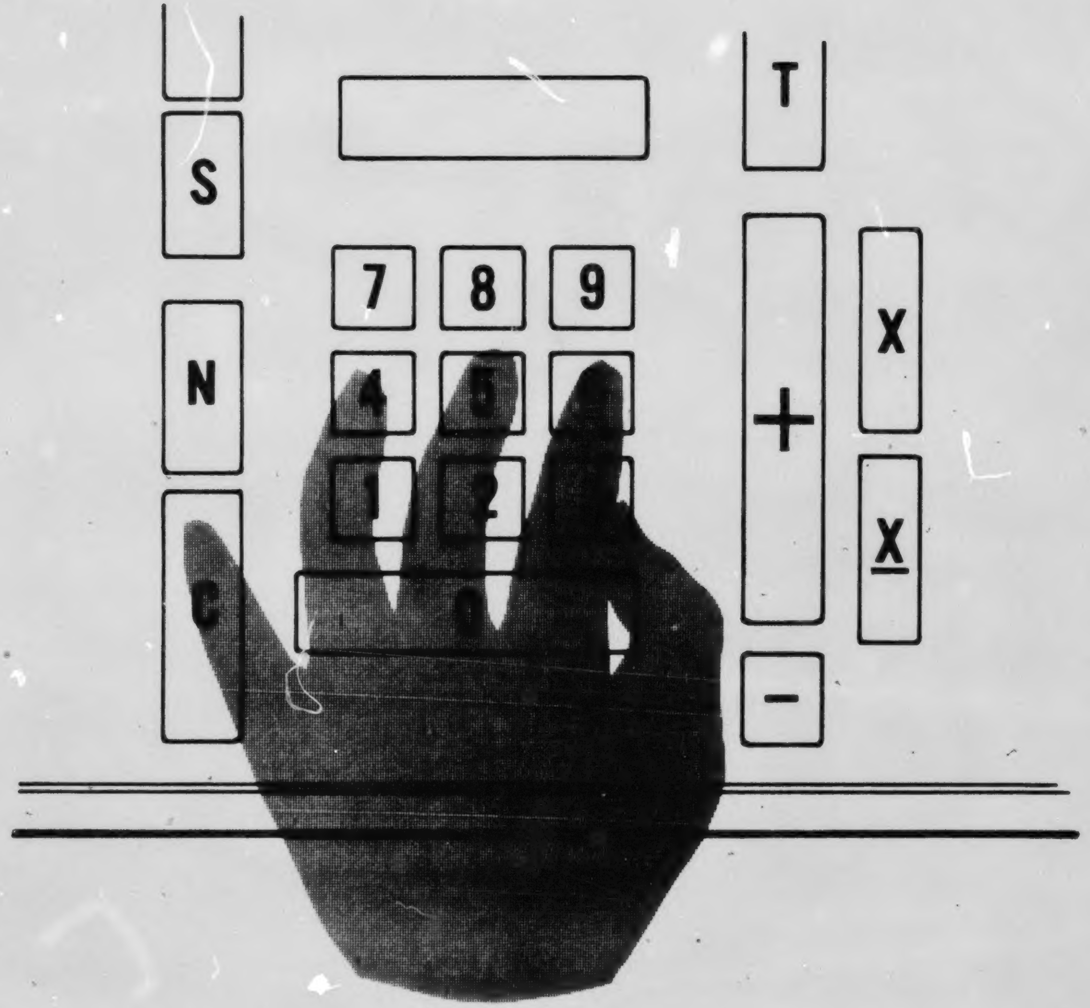
HOME KEY POSITION
Left Hand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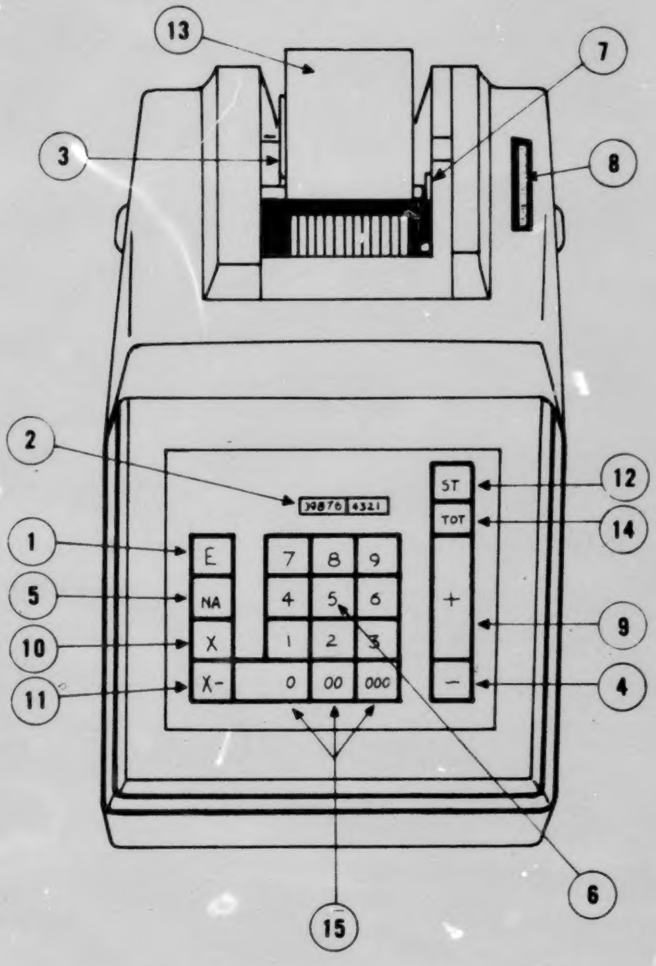
UNIT XI

OPERATING CALCULATING MACHINES

ASSIGNMENT SHEET #1

Directions: Locate the parts on the ten-key adding machine by placing the number next to the correct term.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000
+
−
9
4
6
15

___-platen knob

___-plus bar

___-zero keys

___-subtotal key

___-minus bar

___-line space selector

___-digit indicator

___-repeat key

___-tape

___-non-add key

___-numerical keys

___-total bar

___-paper release lever

___-clear key

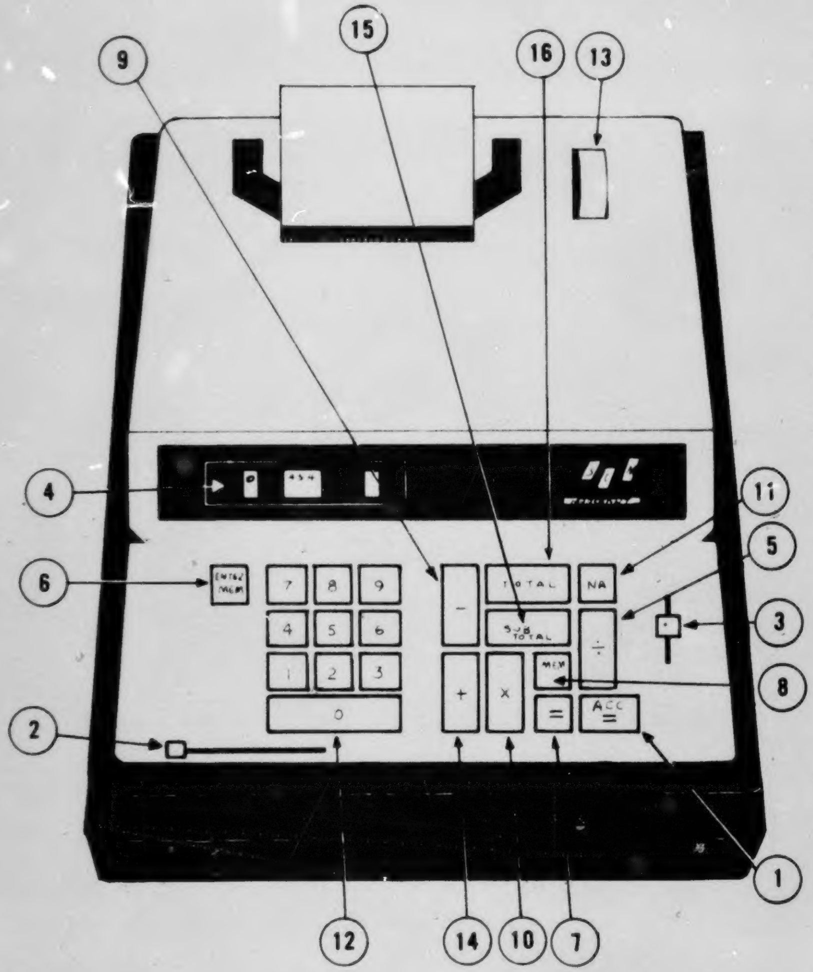
___-repeat subtract key

UNIT XI

OPERATING CALCULATING MACHINES

ASSIGNMENT SHEET #2

Directions: Locate the parts of the mechanical printing calculator by placing the number of the part next to the correct term.


15
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13
4
11
5
6
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7
8
9
4
5
6
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3
0
−
TOTAL
NA
SUB TOTAL
÷
3
+
×
MEM
=
ACC =
8
2
1
12
14
10
7

___-accumulation equals key

___-decimal selector

___-total key

___-non-add key

___-division key

___-equals key

___-minus key

___-number keys

___-platen knob

___-sub-total key

___-memory recall key

___-enter memory key

___-clear entry key

___-plus key

___-multiplication key

___-digit indicator

UNIT XI

OPERATING CALCULATING MACHINES

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

8 platen knob
9 plus bar
15 zero keys
12 sub-total key
4 minus bar
3 line space selector
2 digit indicator
10 repeat key
13 tape
5 non-add key
6 numerical keys
14 total bar
7 paper release lever
1 clear key
11 repeat subtract key

Assignment Sheet #2

1 accumulation equals key
3 decimal selector
16 total key
11 non-add key
5 division key
7 equals key
9 minus key
12 number keys
13 platen knob
15 sub-total key
8 memory recall key
6 enter memory key
2 clear entry key
14 plus key
10 miltiplication key
4 digit indicator

UNIT XI

OPERATING CALCULATING MACHINES

JOB SHEET #1--USE TEN-KEY ADDING MACHINE

I. Equipment needed: Ten-key adding machine

II. Procedure:

A. Read each job carefully before beginning problems.

B. Sit erect and relax.

C. Place both feet flat on the floor.

D. Put thumb on the zero bar.

E. Put first, second and third fingers on the middle bank of keys--the keys 4, 5, and 6.

(NOTE: This is the home-key position from which you reach out to all the keys on the keyboard.)

F. Move your fingers up to the top bank of keys--the keys for 7, 8, and 9.

G. Bring your fingers back to the middle bank.

(NOTE: Notice that the home keys, 4, 5, and 6, are deeper than those of the upper bank.)

H. Reach down to the lower bank of keys--the keys for 1, 2, and 3.

(NOTE: Notice that these are not as deep as the home keys.)

I. Practice reaching up to 7 and down to 1 from the home key, 4, with your index finger.

(NOTE: Your fingers should be curved slightly and you should guide your first finger to the center of the keys for 7, 4, and 1.)

J. Practice reaching up to 8 from the home key, 5, and down to 2 with your second finger (the middle finger).

K. Practice the third finger (ring finger), reaching from the home key, 6, up to 9 and down to 3.

L. Practice until you can reach for the figures 1 through 9 without looking at your fingers.

M. Practice depressing the zero bar or keys, using the thumb.

N. Strike the keys firmly in the center and release them quickly.

(NOTE: You can strike only one key at a time; therefore, be sure to release quickly so that the next key can be depressed. If you happen to depress the wrong key and discover your error before depressing the plus (+) bar, use the error key, bar or lever to eliminate the whole number from the machine. The error or correction keys are located at the left or below the keyboard.)

UNIT XI

OPERATING CALCULATING MACHINES

JOB SHEET #2--ADD ON THE TEN-KEY ADDING MACHINE

I. Equipment needed: Ten-key adding machine

II. Procedure:

(NOTE: The procedures may change with each brand of machine.)

A. Clear the machine.

B. Keep your eyes on the figures of the problem rather than the keyboard.

(NOTE: This is using the touch method.)

C. Depress the correct keys for the first number.

D. Depress the plus (+) bar.

E. Depress keys for the second number.

F. Depress total key.

III. Sample addition problems:

A.
```
123.00
406.00
______
```

B.
```
32.11
66.22
95.33
_____
```

C.
```
6,789.00
3,762.13
   37.44
  563.07
________
```

UNIT XI

OPERATING CALCULATING MACHINES

JOB SHEET #3--SUBTRACT ON THE TEN-KEY ADDING MACHINE

I. Equipment needed: Ten-key adding machine

II. Procedure:

(NOTE: This procedure may change with each brand of machine)

A. Clear the machine.

B. Keep your eyes on the figures of the problem rather than on the keyboard.

C. Depress by touch the minuend (top number).

D. Depress the plus (+) bar.

E. Enter the subtrahend (bottom number).

F. Depress the subtraction key.

(NOTE: On some machines, you may have to operate the plus (+) bar after depressing the subtraction (-) key.)

G. Depress total key.

III. Sample subtraction problems:

A. 36.86
-17.32

B. 6,893.98
- 468.66

C. 86,357.73
-9,432.51

UNIT XI

OPERATING CALCULATING MACHINES

JOB SHEET #4--USE NON-ADD KEY ON THE TEN-KEY ADDING MACHINE

I. Equipment needed: Ten-key adding machine

II. Procedure:

(NOTE: The procedures may vary with each brand of machine.)

A. Clear the machine.

B. Number each problem.

C. Depress keys for the number.

D. Depress the non-add key.

E. Index and list amount in the problem.

III. Sample problems:

A. 26.00
33.23
47.44

B. 103.97
87.22
615.66

C. 7.78
5.37
16.15

D. 9.61
3.45NA
1.89

E. 7.25
8.93
1.45NA

UNIT XI

OPERATING CALCULATING MACHINES

JOB SHEET #5--USE REPEAT KEY ON THE ADDING MACHINE

I. Equipment needed: Ten-key adding machine

II. Procedure:

(NOTE: The procedure may change with each brand of machine.)

A. Clear the machine.

B. Depress first number.

C. Depress the repeat key (push upward to lock if the machine is equipped with this feature)

D. Depress add-total bar as needed.

E. Release repeat key by pushing downward.

F. Depress clear key to erase the keyboard.

G. Depress add-total bar for the total.

III. Sample problems:

A. 34.87
34.87
34.87
34.87
34.87
34.87

B. 26.53
26.53
26.53
9.64
9.64
158.91

C. 721.98
5.64
5.64
5.64
29.83
148.65

UNIT XI

OPERATING CALCULATING MACHINES

JOB SHEET #6--USE SUB-TOTAL KEY ON THE ADDING MACHINE

I. Equipment needed: Ten-key adding machine

II. Procedure:

(NOTE: The procedure may change with each brand of machine.)

A. Clear the machine.

B. Depress and print figures.

C. Depress the sub-total key.

D. List the remaining figures.

E. Depress add-total bar to get a final total of the problem.

III. Sample problems:

A.
4.09
16.35
11.66
2.01
S
14.27
5.30
27.74
174.63
4.15
T

B.
14.14
6.09
5.31
116.27
8.54
11.94
S
15.48
8.61
T

C.
21.03
163.15
14.59
6.05
S
.56
40.53
106.33
T

UNIT XI

OPERATING CALCULATING MACHINES

JOB SHEET #7--FIND THE DECIMAL EQUIVALENTS FOR FRACTIONS

I. Materials needed: Pencil to record results

II. Procedure:

Using the "Decimal Equivalents for Fractions" chart located on the Information Sheet, find the decimal for each of these fractions.

III. Sample problems:

A. 1/4 =

B. 4/9 =

C. 6/8 =

D. 1/2 =

E. 1/2 =

F. 3/4 =

G. 5/8 =

H. 4/5 =

I. 2/3 =

J. 1/8 =

UNIT XI

OPERATING CALCULATING MACHINES

JOB SHEET #8--MULTIPLY, USING THE "DECIMAL EQUIVALENT CHART" FOR FRACTIONS

I. Equipment needed: Ten-key adding machine

II. Procedure:

- A. Clear the machine
- B. Depress and print the whole number
- C. Using the "Decimal Equivalent of Fractions" chart, change the mixed number to decimal and print the numbers using the repeat key to mulitply
- D. Depress the total key to get the final total of the problem

III. Sample problems

- A. 18 3/4 x 17 =
- B. 12 x 1 1/2 =
- C. 8 x 6 2/3 =
- D. 124 x 2 5/9 =
- E. 1,076 x 4 1/4 =
- F. 12 1/2 x 6 2/3 =
- G. 9 x 5 5/8 =

UNIT XI

OPERATING CALCULATING MACHINES

JOB SHEET #9--MULTIPLY, USING THE MECHANICAL PRINTING CALCULATOR

I. Equipment and materials needed:

A. Mechanical printing calculator

B. Pencil to record results

II. Procedure:

A. Clear the machine

B. Lower master control level so that the X is showing

(NOTE: This step varies according to particular machine in use.)

C. Depress the first numbers

D. Depress the motor-add bar

E. Depress the second numbers

F. Observe total on tape

III. Sample problems:

A. 6 x 8 =

B. 4 x 12 =

C. 27 x 9 =

D. 82 x 31 =

E. 639 x 36 =

F. 21 x 1,473 =

UNIT XI

OPERATING CALCULATING MACHINES

JOB SHEET #10--DIVIDE AUTOMATICALLY USING THE MECHANICAL PRINTING CALCULATOR

I. Equipment and materials needed:

A. Mechanical printing calculator

B. Pencil to record results

II. Procedure:

A. Clear the machine.

B. Raise the master control lever so that the division key (÷) is showing

(NOTE: This step will vary according to machine being used.)

C. Depress the dividend and add three zeros

D. Depress the motor-add bar

E. Depress the divisor

F. Depress the motor-add bar

G. Observe total on tape

(NOTE: If there is a remainder, it will print below the quotient (total).

III. Sample problems:

A. 139 ÷ 3 =

B. 76 ÷ 43 =

C. 127 ÷ 21 =

D. 346 ÷ 18 =

E. 1,976 ÷ 232 =

F. 4,369 ÷ 408 =

UNIT XI

OPERATING CALCULATING MACHINES

ANSWERS TO JOB SHEETS

JOB SHEET #1

Evaluated to the satisfaction of the instructor.

JOB SHEET #2

A. 529.00

B. 193.66

C. 11,151.64

JOB SHEET #3

A. 19.54

B. 6,425.32

C. 76,925.22

JOB SHEET #4

A. 106.67

B. 806.85

C. 29.30

D. 14.95

E. 17.63

JOB SHEET #5

A. 209.22

B. 257.78

C. 917.38

JOB SHEET #6

A. 34.11S
260.20T

B. 162.29S
186.38T

C. 204.82S
352.24T

JOB SHEET #7

A. .25

B. .44444

C. .75

D. .5

E. .33333

F. .75

G. .625

H. .8

I. .66665

J. .125

JOB SHEET #8

A. 318.75

B. 18

C. 53.33328

D. 316.88944

E. 4,573

F. 83.33325

G. 50.625

JOB SHEET #9

A. 48

B. 48

C. 243

D. 2,542

E. 23,004

F. 30,933

JOB SHEET #10

A. 46.33333

B. 17.76744

C. 6.04761

D. 19.22222

E. 8.51724

F. 10.70833

UNIT XI

OPERATING CALCULATING MACHINES

UNIT TEST

1. Define the following terms:

   A. Ten-key machine

   B. Listing

   C. Indexing a number

   D. Home position

   E. Touch system

2. Match the terms on the left with their correct definitions by placing the correct numbers in the spaces provided.

_____a. add key

_____b. subtract key

_____c. repeat key

_____d. sub-total key

_____e. non-add key

_____f. clear key

_____g. total key

1. Clears an incorrect entry
2. Used to provide a partial total if needed
3. Used to set up the machine for multiplication
4. Used to index numbers to be added
5. Recalls the sum from the machine
6. Used to index numbers to be subtracted
7. Used to record a number not included in a total

3. Explain the difference between the ten-key adding machine and the mechanical printing calculator.

4. Place a "√" beside those statements that are true on learning the operating system.

_____a. Machine is placed slightly to the left of the body.

_____b. Right-handed persons will use their left hands for handling papers.

_____c. In clearing a manual machine, the total key is depressed and the operating handle is pulled toward the individual.

_____d. When clearing an electric machi[illegible], the total key is depressed only once.

5. Explain when decimal equivalents are us[illegible].

6. Locate the parts on a ten-key adding machine.
7. Locate the parts on a mechanical printing calculator.
8. Demonstrate the ability to:
    a. Use the ten-key adding machine.
    b. Add on the ten-key adding machine.
    c. Subtract on the ten-key adding machine.
    d. Use non-add key on the ten-key adding machine.
    e. Use repeat key on ten-key adding machine.
    f. Use sub-total key on ten-key adding machine.
    g. Find the decimal equivalents for fractions.
    h. Multiply using the decimal equivalents for fractions.
    i. Multiply using the mechanical printing calculator.
    j. Divide automatically using the mechanical printing calculator.

(NOTE: If activities #6 - #8 have not been completed prior to the test, ask the instructor when they should be completed.)

UNIT XI

OPERATING CALCULATING MACHINES

ANSWERS TO UNIT TEST

1. a. Ten-key machine--Machine which contains one number entry key for each of the digits 1-9, plus the 0, along with common operation keys

   b. Listing-Process by which each set of numbers is printed on a paper tape

   c. Indexing a number-Term used when placing a number on the keyboard

   d. Home position-The starting position from which the fingers move to strike all of the other keys

   e. Touch system-Using keys by touch rather than sight

2. _4_ a.

   _6_ b.

   _3_ c.

   _2_ d.

   _7_ e.

   _1_ f.

   _5_ g.

3. A ten-key adding machine is used when there is little need for multiplication and division work, where as a mechanical printing calculator can do many kinds of office work and can divide and multiply automatically.

4. ____ a.

   _✓_ b.

   _✓_ c.

   ____ d.

5. They are used to convert fractional numbers into decimals when working with office calculating machines.

6. Evaluated to the satisfaction of the instructor
7. Evaluated to the satisfaction of the instructor
8. Evaluated to the satisfaction of the instructor

UNIT XII

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

UNIT OBJECTIVE

After completing this unit, the student should be able to define indexing terminology, and cite indexing procedures and rules. The student will also be able to code, arrange and type names on index cards for filing. This knowledge will be evidenced through demonstration and by satisfactorily completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student should be able to:

1. Match filing terms with their correct definitions
2. List the four indexing procedures
3. Identify indexing rules
4. Note procedures used in cross-referencing
5. Demonstrate the ability to:
    a. Arrange names in correct indexing and alphabetical order
    b. Cross-reference personal names
    c. Type names on index cards in correct indexing order

UNIT XII

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

SUGGESTED ACTIVITIES

I. Instructor:

  A. Provide objective sheet

  B. Discuss objective sheet

  C. Provide information sheet

  D. Discuss information sheet

  E. Make transparencies and show examples demonstrating the rules for indexing personal names

  F. Provide assignment sheets

  G. Discuss procedures outlined in assignment sheets

  H. Give test and evaluate results

II. Student:

  A. Read objective sheet

  B. Study information sheets

  C. Look at transparencies and give other examples showing correct indexing of personal names

  D. Participate in class discussion of indexing personal names

  E. Complete assignment sheets

  F. Take test

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheets

C. Transparency Masters
    1. XII-TM-1--Examples of Rule A
    2. XII-TM-2--Examples of Rule B
    3. XII-TM-3--Examples of Rule C
    4. XII-TM-4--Examples of Rule D
    5. XII-TM-5--Examples of Rule E
    6. XII-TM-6--Examples of Rule F
    7. XII-TM-7--Examples of Rule G
    8. XII-TM-8--Examples of Rule H
    9. XII-TM-9--Examples of Rule I
    10. XII-TM-10--Examples of Rule J
    11. XII-TM-11--Examples of Rule K
    12. XII-TM-12--Cross-Referencing Married Women's Names
    13. XII-TM-13--Cross-Referencing Unusual Names

D. Assignment sheets
    1. Assignment Sheet #1--Determining Indexing and Alphabetic Order
    2. Assignment Sheet #2--Cross-Referencing Personal Names
    3. Assignment Sheet #3--Typing and Indexing Names

E. Answers to assignment sheets

F. Unit test

G. Answers to unit test

8

II. References

A. Books

1. Bassett, Ernest D. and David G. Goodman. Business Filing and Records Control. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

2. __________. Office Filing Procedures. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

3. Johnson, Mina M. and Norman F. Kallaus. Records Management. 2nd ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

4. Meehan, James R. and others. Clerical Office Procedures. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

5. __________. Secretarial Office Procedures. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

B. Practice Sets

1. Duchan, Simon A. and Robert A. Schultheis. Filing Personal Names, Learning Activity Package I. Cincinnati: South-Western Publishing Co., 1974.

2. Kahn, Gilbert, Jeffrey R. Stewart, and Theodore Yerian. Gregg Quick Filing Practice. New York: McGraw-Hill Book Company, 1965.

UNIT XII

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

INFORMATION SHEET

I. Definition of Terms

A. Personal name--The real name of a person used either as an individual name or part of a business name (not a nickname)

B. Surname--The last (or family) name of a person

C. Given name--The first name or initial of a person

D. Middle name--A given name or initial following the first name

E. Full name--The surname and at least the given name or initial of a person

F. Natural order--The order in which a name normally appears

G. Indexing--Dividing names into units to help select the heading under which a record is to be filed

H. Indexing arrangement--The order in which the units of a name are arranged for filing

I. Unit--Each part of a person's or organization's name used in filing alphabetically

J. Indexing unit--A part of a name used in indexing

K. Coding--Marking indexing units in a name to indicate order in which units will be filed

L. Filing order--The order in which a name is written for filing purposes

M. Alphabetizing--The arrangement of single letters or words from A-Z

N. Filing--Orderly arrangement and storage of letters, invoices, statements and other office records that are needed for future reference

O. Cross-reference--A note in an index showing that a document is filed somewhere else

II. Indexing Procedures

A. Find out how many units a name contains

B. Find out which unit of the name is the most important for filing purposes

C. Code the names in correct filing order

D. Alphabetize the names for filing

III. Rules for Alphabetical Indexing of Personal Names

A. Each letter and each part of a individual's name is a separate indexing unit. (See TM-1)

B. An individual's name is changed so that the surname becomes the first unit, the given name (or initial) becomes the second unit, and the middle name (or initial) becomes the third unit. (See TM-2)

C. If two or more surnames are alike, the order of filing is determined by the second unit. If the second unit is alike, the filing order is determined by the third unit. (See TM-3)

D. A surname with only an initial comes before a surname with a complete first name. This is the "nothing comes before something" rule. (See TM-4)

E. A foreign particle (sometimes called a prefix) or a foreign article is combined with that part of the name following it to form a single indexing unit. (See TM-5)

F. A personal or professional title or degree is usually not considered in determining alphabetic order. A title or degree is written in parenthesis at the end of the name to identify the person. A name consisting of a title followed by only one name is indexed in the order it is written. (See TM-6)

G. Seniority titles are not considered to be indexing units but are used when determining the correct order. (See TM-7)

H. Addresses are used to determine filing order when full names are the same. Addresses are not used as indexing units. (See TM-8)

I. Hyphenated surnames are usually put as separate units, and hyphens are not used when indexing such names. (See TM-9)

J. A woman's married or maiden name is used for filing purposes. If the married name is used, "Mrs." is written in the parentheses after a name (See TM-10)

K. When it is difficult to determine which unit of a person's name is the surname, the last unit as it appears in written form is used as the surname. Unusual names may be cross-referenced. (See TM-11)

IV. Cross-Referencing

A. Married women's names (See TM-12)

1. Many women like to use their maiden name, instead of their married name. In both cases, write the name on the first line of the original card. On the 4th line, write "Mrs." and her husband's name.

2. On first line of cross-reference card, write in index form, the husband's name followed by "Mrs." On the fourth line, write See followed by the legal name in index form.

B. Unusual Names (See TM-13)

1. In index form, write unusual name on first line of original card (see Ling, Tu). On fourth line write Tu Ling.

2. On first line of cross-reference card, write Tu Ling, and on fourth line, write See Ling, Tu.

3. If cards are numbered, use number of original card followed by an X.

RULE A

Each letter and each part of an individual's name is a separate indexing unit.

EXAMPLES

1	2	3
JOHN /	P. /	JONES

1	2	3
J. /	P. /	JONES

RULE B

The surname becomes the first unit, the given name (or initial) becomes the second unit, and the middle name (or initial) becomes the third unit.

EXAMPLES

NAME	INDEXING UNITS 1	 2	 3
JOHN P. JONES	JONES	JOHN	P.
JAMES Q. JOSEY	JOSEY	JAMES	Q.
RICHARD M. JOTTING	JOTTING	RICHARD	M.
DARRYL LEE	JUNCTION	DARRYL	LEE
T. Q. JUSTIN	JUSTIN	T.	Q.

RULE C

If two or more surnames are alike, , the order of filing is determined by the second unit. If the second unit is alike, the filing order is determined by the third unit.

EXAMPLES

Johnson, James T.

Johnson, Raymond A.

Johnson, Raymond B.

RULE D

A surname with only an initial comes before a surname with a complete first name.

EXAMPLES

NAME	INDEXING UNITS		
	1	2	3
R. JONES	JONES	R.	
R. M. JONES	JONES	R.	M.
RAY JONES	JONES	RAY	

RULE E

A foreign particle (prefix) or a foreign article is combined with that part of the name following it to form a single indexing unit.

EXAMPLES

NAME	INDEXING UNITS 1	 2	 3
C. A. VAN HAVEN	VAN HAVEN	C.	A.
JOHN E. VON ASPERN	VON ASPERN	JOHN	E.
JAMES D. LA FONT	LA FONT	JAMES	D.
MICHAEL LE BLANC	LE BLANC	MICHAEL	
HAROLD G. McDONALD	McDONALD	HAROLD	G.

RULE F

A title or a degree is written in parentheses at the end of the name for identification purposes

EXAMPLES

NAME	**INDEXING**
KATE JACKSON, ED. D.	JACKSON, KATE (ED. D.)
DR. FRANK L. INLOW	INLOW, FRANK L. (DR.)
REV. L. D. EULESS	EULESS, L. D. (REV.)
SIR KINGWAY	SIR KINGWAY
LORD BALTIMORE	LORD BALTIMORE

A name consisting of a title followed by only one name is indexed in the order it is written.

TM-6

RULE G

Seniority titles are not considered as indexing units but are identifying elements when determining correct order.

EXAMPLES

NAME	INDEXING UNITS 1	 2
CHARLES RANDOLPH JR.	RANDOLPH	CHARLES (JR.)
CHARLES RANDOLPH SR.	RANDOLPH	CHARLES (SR.)
ALLEN R. RUDOLPH I	RUDOLPH	ALLEN (I)
ALLEN R. RUDOLPH II	RUDOLPH	ALLEN (II)
ALLEN R. RUDOLPH III	RUDOLPH	ALLEN (III)

RULE H

Addresses determine filing order when full names are identical, but are not considered indexing units.

EXAMPLES

ROBERT	L.	SMITH,	GARLAND,	TX.
ROBERT	L.	SMITH,	GARY,	IN.

RULE I

Hyphenated surnames are treated as separate indexing units.

EXAMPLES

NAME	INDEXING UNITS 1	 2	 3
RUTH GOZ-WARE	GOZ	WARE	RUTH
VICTOR CROS-VOGAL	CROS	VOGAL	VICTOR
JEAN HOLTZ-BORG	HOLTZ	BORG	JEAN

RULE J

A woman's married or maiden name is used for filing purposes.

EXAMPLES

NAME	INDEXING UNITS		
	1	2	3
JANE ANN CLARK	CLARK	JANE ANN	ALLEN (MRS.)
MRS. LOUISE ALLEN FONTZ	FONTZ	LOUISE	
MRS. HAROLD ROLLINS (JACKIE)	ROLLINS	JACKIE (MRS.)	
MRS. ROBERT SMITH (KAY LEE)	SMITH	KAY LEE (MRS.)	

FILED UNDER	CROSS-REFERENCED UNDER
ROLLINS, JACKIE (MRS.)	ROLLINS, HAROLD (MRS.)
SMITH, KAY LEE (MRS.)	SMITH, ROBERT (MRS.)

RULE K

With unusual names, the last unit as it appears in written form is used as the surname.

EXAMPLES

NAME	FILED UNDER	CROSS-REFERENCE
HARRISON LYMAN	LYMAN, HARRISON	HARRISON, LYMAN
SESSION PHILLIP	PHILLIP, SESSION	SESSION, PHILLIP

CROSS-REFERENCING
MARRIED WOMEN'S NAMES

Smith, Kay Lee I

Mrs. Robert Smith
526 Lanewood Drive
Oakland, CA 94601

ORIGINAL CARD

Smith, Robert (Mrs.) Ix

526 Lanewood Drive
Oakland, CA 94601

SEE
Smith, Kay Lee

CROSS-REFERENCE CARD

CROSS-REFERENCING UNUSUAL NAMES

Son, Gen (Dr.) 51

Dr. Gen Son
594 Medical Towers
Burlingame, CA 94010

ORIGINAL CARD

Gen Son (Dr.) 51x

594 Medical Towers
Burlingame, CA 94010

SEE
Son, Gen (Dr.)

CROSS-REFERENCE CARD

UNIT XII

INDEXING, ALPHABETIZING AND FILING PERSONAL NAMES

ASSIGNMENT SHEET #1--DETERMINING INDEXING AND ALPHABETIC NAMES

Directions:

I. Arrange the following list of names in correct indexing order.

Alta B. Garcia

Granklin Robert

Pierce Brown

Anna Santy-Williams

Howard Van Cliff

Jim Roth, Jr.

Jim Roth, Sr.

Sarah Bernhart Johnson

O. Garcia

P.J. Woods

J. Anson Williams

Mrs. James Adams (Jane)

Louetta Ruth Aster

John Allen

Carry Lee Astoria

Gerald Hare (I)

Gerald Hare (II)

Gerald Hare (III)

II. Arrange the above list in alphabetical order according to the first indexing unit. If surnames are alike, Consider the second unit, then the third, etc.

UNIT XII

INDEXING, ALPHABETIZING AND FILING PERSONAL NAMES

ASSIGNMENT SHEET #2--CROSS-REFERENCING

Directions: The following list of names have been indexed and placed in alphabetic filing order. Place a "√" in one of the columns to the right to indicate if the name has been indexed and cross-referenced correctly.

	RIGHT	WRONG
1. Mrs. Raymond R. Miller (Peggy Ann) Miller, Peggy Ann SEE Miller, Raymond R. (Mrs.)		
2. Mrs. Harold Cummings (Connie R.) Cummings, Connie R. SEE Cummings, Harold (Mrs.)		
3. Mrs. Van T. Arnold (June Marie) Arnold, June Marie SEE Arnold, Van T. (Mrs.)		
4. Mrs. James Ray Hearn (Vickie) Hearn, James Ray (Mrs.) SEE Hearn, Mrs. Vickie		
5. Gen, Son Gen, Son SEE Son, Gen		
6. Jackson Andrew Jackson, Andrew SEE Andrew, Jackson		
7. Rogers Mitchell Mitchell, Rogers SEE Rogers, Mitchell		

8. Harrison Fairchild

Fairchild, Harrison
SEE Harrison, Fairchild

9. Drayson, Lynik

Lynik, Drayson
SEE Drayson, Lynik

RIGHT	WRONG

UNIT XII

INDEXING, ALPHABETIZING AND FILING PERSONAL NAMES

ASSIGNMENT SHEET #3--TYPING AND INDEXING NAMES

I. Tools, Materials and Equipment Required:

A. Ten 3" x 5" index cards (or paper cut to size)

B. Typewriter

II. Directions: Type each of the following names in correct indexing order on the index cards. Begin typing six spaces from the left edge of the card on the third line from the top.

NAMES

Betsy Book, 6713 Kenwick, Dallas, Texas

Ralph Brown, 1313 Ruby Street, Fort Worth, Texas

Carl Baker, 1212 Finwich, Sherman, Texas

Marie Maddox, 713 Alta Vista, Houston, Texas

Susan Thompson, 616 Ridgeway, Dallas, Texas

Sue B. Thompson, 603 Ridgeway, Dallas, Texas

R. J. Brown, 4789 Wren, San Antonio, Texas

Betsy Book, 1121 Kendel, Overton, Texas

Henry O'Reilly, 226 Rodeo, Odessa, Texas

Sue Ann Nevins, 111 Freeway Drive, Mineral Wells, Texas

After completing the cards, place them in correct alphabetic order and turn in to instructor for evaluation.

UNIT XII

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

I. Garcia, Alta B.
   Robert, Franklin
   Brown, Pierce
   Williams, Anna Santy
   Von Cliff, Howard
   Roth, Jim (Jr.)
   Roth, Jim (Sr.)
   Johnson, Sarah Bernhart
   Garcia, O.
   Woods, P. J.
   Williams, J. Anson
   Adams, Jane (Mrs.)
   Aster, Louetta Ruth
   Allen, John
   Astoria, Carry Lee
   Hare, Gerald (I)
   Hare, Gerald (II)
   Hare, Gerald (III)

II. Adams
    Allen
    Aster
    Astoria

Brown

Garcia, Alta B.

Garcia, O.

Hare, Gerald (I)

Hare, Gerald (II)

Hare, Gerald (III)

Johnson

Robert

Roth, Jim (Jr.)

Roth, Jim (Sr.)

Van Cliff

Williams, Anna Santy

Williams, J.

Woods

Assignment Sheet #2

	RIGHT	WRONG
1.	✓	
2.	✓	
3.	✓	
4.		✓
5.	✓	
6.	✓	
7.	✓	
8.	✓	
9.	✓	

Assignment Sheet #3

Baker, Carl

Book, Betsy, Dallas

Book, Betsy, Overton

Brown, R. J.

Brown, Ralph

Maddox, Marie

Nevins, Sue Ann

O'Reilly, Henry

Thompson, Sue B.

Thompson, Susan

UNIT XII

INDEXING, ALPHABETIZING AND FILING PERSONAL NAMES

UNIT TEST

1. Match terms on the left with their correct definitions by placing the letter in the space provided.

_____ personal name

_____ surname

_____ given name

_____ full name

_____ natural order

_____ indexing

_____ middle name

_____ indexing arrangement

_____ unit

_____ indexing unit

_____ coding

_____ filing order

_____ alphabetizing

_____ filing

_____ cross-reference

a. A note in an index showing that a document is filed somewhere else

b. The arrangement of single letters or words from A-Z

c. Each part of a person's or organization's name used in filing alphabetically

d. Dividing names into units to help select the heading under which a record is to be filed

e. The order in which the units of a name are arranged for filing

f. The real name of a person

g. The order in which a name normally appears

h. Orderly arrangement and storage of printed materials

i. Marking indexing units in a name to indicate order in which units will be filed

j. Last name of a person

k. The surname and at least one given name or initial of a person

l. A part of a name used in indexing

m. The order in which a name is written for filing purposes

n. The first name or initial of a person

o. The given name following the first name

2. List the four indexing procedures.

a.

b.

c.

d.

3. Place a "✓" to the left of the statements that are true concerning indexing personal names.

_____a. Each letter and each part of a name is a separate indexing unit.

_____b. An individual's surname is changed so that the surname becomes the first unit used in filing.

_____c. If two surnames are alike, the next indexing unit considered is the name of the city.

_____d. A surname with a full first name comes before a surname with an initial.

_____e. A foreign particle is combined with the part of the name following it to form a single indexing unit.

_____f. Hyphenated names become one filing unit.

_____g. A married woman's legal name is always used for filing purposes.

_____h. When it is difficult to determine a person's surname, the last name appearing in written form is considered the surname.

_____i. Names of married women are never corss-referenced.

_____j. Seniority titles are put as indexing units.

4. Put a "✓" beside the steps involved with cross-referring.

   a. Women's Married Names

      _____(1) The women's legal name is written on the first line of the original card.

      _____(2) On the fourth line of the original card, the term "Mrs." is written along with the wife's maiden name.

      _____(3) On the cross-reference card, the husband's name followed by "Mrs." is written on the first line.

   b. Unusual Names

      _____(1) On the original card the unusual name is written on the first line in index form.

      _____(2) If index cards are numbered, the number of the original card is followed with a W.

5. Demonstrate the ability to:

   a. Arrange names in correct indexing and alphabetic order.

   b. Cross-reference personal name.

   c. Type names on index cards in correct indexing order.

      (NOTE: If these activities have not been completed prior to the test, ask the instructor when they should be completed.)

UNIT XII

INDEXING, ALPHABETIZING AND FILING PERSONAL NAMES

ANSWERS TO UNIT TEST

1. __f__ personal name
   __j__ surname
   __n__ given name
   __k__ full name
   __g__ natural order
   __d__ indexing
   __o__ middle name
   __e__ indexing arrangement
   __c__ unit
   __l__ indexing unit
   __i__ coding
   __m__ filing order
   __b__ alphabetizing
   __h__ filing
   __a__ cross-reference

2. a. Determining how many units a name contains

   b. Determining which unit of the name is the most important for filing purposes

   c. Coding the names in correct filing order

   d. Alphabetizing the names for filing

3. __✓__ a.
   __✓__ b.
   _____ c.
   _____ d.

__✓__ e.

_____ f.

_____ g.

__✓__ h.

_____ i.

_____ j.

4. a.

__✓__ (1)

_____ (2)

__✓__ (3)

b.

__✓__ (1)

_____ (2)

5. Evaluated to the satisfaction of the instructor.

UNIT XIII

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

UNIT OBJECTIVE

After completing the unit, the student should be able to discuss, explain, and identify rules pertaining to business names; index, alphabetize, and file business names; and cross-reference business names. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student should be able to:

1. Identify statements that are true concerning indexing personal names contained in business names
2. Arrange steps in indexing identical business names
3. Identify rules for indexing business names with articles, prepositions, and conjunctions
4. Explain how to index abbreviations
5. List the three rules pertaining to single letters in business names
6. Identify correct statements concerning indexing hyphenated business names
7. Explain how to index words considered as one word
8. Identify rules for indexing numbers and symbols
9. Explain how to index words with possessives
10. Discuss rules for compound geographic business names
11. State three rules for indexing foreign business names

12. Identify rules for cross-referencing business names.

13. Demonstrate the ability to:

    a. Index, alphabetize, and file names and correct misfilings.

    b. Cross-reference business names.

    c. Index, alphabetize, and file business names on cards.

UNIT XIII

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

SUGGESTED ACTIVITIES

I. Instructor

   A. Provide students with objective sheet

   B. Discuss objective sheet

   C. Pass out information sheets

   D. Discuss information sheets

   E. Pass out job sheet

   F. Demonstrate procedures outlined on job sheet

   G. Pass out assignment sheets

   H. Give test and evaluate results

II. Student

   A. Read objective sheet

   B. Study information sheet and participate in classroom discussions

   C. Complete assignment and job sheets

   D. Take test

INSTRUCTIONAL MATERIALS

I. Included in this unit

   A. Objective sheet

   B. Information sheet

   C. Transparencies

      1. XIII-TM-1--Indexing Personal Names Contained in Business Names

   2. XIII-TM-2--Indexing Identical Business Names
   3. XIII-TM-3--Indexing Articles, Prepositions, and Conjunctions
   4. XIII-TM-4--Indexing Abbreviations
   5. XIII-TM-5--Indexing Single Letters
   6. XIII-TM-6--Indexing Hyphenated Business Names
   7. XIII-TM-7--Indexing Words Considered As One
   8. XIII-TM-8--Indexing Numbers and Symbols
   9. XIII-TM-9--Indexing Possessives
   10. XIII-TM-10--Indexing Compound Geographic Business Names
   11. XIII-TM-11--Indexing Foreign Business Names
   12. XIII-TM-12--Cross-Referencing Business Names
   13. XIII-TM-13--Cross-Referencing Business Names
   14. XIII-TM-14--Cross-Referencing Business Names

D. Assignment sheets

   1. Assignment Sheet #1--Applying Rules for Business Names
   2. Assignment Sheet #2--Cross-Referencing Business Names

E. Answers to assignment sheets

F. Job Sheet #1--Filing Business Names on Cards

G. Answers to job sheet

H. Test

I. Answers to test

II. References

A. Books

1. Bassett, Ernest D. and David G. Goodman. Business Filing and Records Control. 4th ed. Cincinnati: South-Western Publishing Co., 1973.

2. Duchan, Simon A. and Robert A. Schultheis. Filing Business Names. Cincinnati: South-Western Publishing Co., 1974.

3. Gregg, John Robert and others. Applied Secretarial Procedures. 7th ed. Cincinnati: South-Western Publishing Co., 1974.

4. Meehan, James R. and others. Clerical Office Procedures. 5th ed. Cincinnati: South-Western Publishing Co., 1974.

5. Meehan, James R. and others. Secretarial Office Procedures. 8th ed. Cincinnati: South-Western Publishing Co., 1972.

6. Morrison, Phyllis. Career in The Modern Office. New York: Gregg Division McGraw-Hill Book Co., 1969.

B. Additional References:

1. Practice Sets

   a. Bassett, Ernest D. and David G. Goodman. Alphabetic Filing Procedures. Cincinnati: South-Western Publishing Co., 1974.

   b. ______________. Office Filing Procedures. 4th ed. Cincinnati: South-Western Publishing Co., 1974.

2. Workbooks

Guthrie, Mearl R. Alphabetic Filing. 3rd ed. Cincinnati: South-Western Publishing Co., 1964.

UNIT XIII

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

INFORMATION SHEET

I. Indexing personal names contained in business names (TM-1)

A. Each word is a separate indexing unit.

B. Change the name in this order: Surname, given name or initial, middle name or initial.

C. Titles followed by a single given name are separate indexing units and are indexed in the order in which they are written.

(NOTE: Mr., Mrs., and MS are indexed as they are written.)

II. Indexing same business names (TM-2)

A. When all units in the names of two or more businesses are the same, the addresses are used for correct filing order.

B. First use the city or town; state names are used when two cities have the same name; street addresses are used if the same name is located at different addresses within the same city; if the same street, then file should be arranged from lowest to highest street number.

(NOTE: The name of the building is used only when the street name is not known.)

III. Indexing articles, prepositions, and conjunctions (TM-3)

A. Articles, prepositions, and conjunctions are not used as indexing units and should be put in parentheses.

B. When a preposition is the first word of a business, it is used as the first indexing unit.

IV. Indexing abbreviations (TM-4)

- A. Abbreviations are indexed as if they were written in full.
- B. When the meaning is not known, the abbreviation is indexed as it is written.

V. Indexing single letters (TM-5)

- A. "Nothing before something;" so each letter or initial is a separate indexing unit.
- B. A single letter comes before a word that begins with that letter.
- C. Hyphens and spacing between letters are not important.

VI. Indexing hyphenated business names (TM-6)

- A. In hyphenated business names, hyphens are ignored, and each word is a separate indexing unit.
- B. Two parts of a word joined by a hyphen become one indexing unit.
- C. Each part of a "coined" word joined by a hyphen is a separate indexing unit.

VII. Indexing words considered as one (TM-7)

- A. Words written as one or two words which are often used as one word are indexed as a single unit.
- B. The use of a hyphen or spacing is not used in indexing.

VIII. Indexing numbers and symbols (TM-8)

- A. Numbers and symbols in a business name are spelled out for indexing.

  (NOTE: Numbers and symbols are written in figures though spelled out for indexing.)
- B. The complete number is one word.
- C. When a number is with a symbol, each is a separate indexing unit.

(NOTE: Four digit numbers are written in hundreds; five digit numbers are in thousands.)

IX. Indexing possessives (TM-9)

- A. When words within a name have an apostrophe, all of the letters in that word up to the apostrophe are used in indexing.
- B. When an "s" follows the apostrophe, it is not used in indexing.

X. Indexing compound geographic business names (TM-10)

- A. In compound geographic names containing two words, such as New York, each word is a separate indexing unit.
- B. Compound geographic names written as one word, such as Portland, are one indexing unit.

XI. Indexing foreign business names (TM-11)

- A. Each word (not particles or prefixes) in foreign business names is a separate indexing unit.
- B. A foreign particle or prefix (such as d, el, and la) is put with the word following it.

  (REASON: The translated form includes articles, prepositions, or conjunctions.)
- C. Unusual foreign names are indexed as they are written.

XII. Cross-referencing business names

- A. Combined surnames in a business name (TM-12)
  - 1. Original--The original is filed as it is written.
  - 2. Cross-references--A cross-reference is prepared for each surname after the first surname.
- B. Businesses with more than one name (TM-12)

1. A company is organized under one name but conducts its business under another name.
    a. Original--The original is filed under the name in which it carries on its business.
    b. Cross-reference--A cross-reference is prepared under its organization name.
2. A company using a short form of the name.
    a. Original--The original is indexed under the shorter form.
    b. Cross-reference--The cross-reference is made under the full name.

C. Branches or affiliates of businesses (TM-13)

1. Original--The original is indexed under the name appearing on the letterhead.
2. Cross-reference--The cross-reference is made under the name of the parent company.

D. Unusual or difficult business name combinations (TM-13)

1. Original--The original is indexed as it is written.
2. Cross-reference--The cross-reference is made under other possible combinations.

E. Initials and abbreviations (TM-4)

1. Original--The original is indexed under the name of the business.
2. Cross-reference--The cross-reference is made under the initial or abbreviation.

F. Change in a company name (TM-14)

1. Original--The original is indexed under the new name.
2. Cross-reference--The cross-reference is made under the former name.

INDEXING PERSONAL NAMES CONTAINED IN BUSINESS NAMES

EXAMPLES

	ALPHABETIC FILING ORDER			
	1	2	3	4
JAMIE JONES PET SUPPLIES	_J_ONES	JAMIE	PET	SUPPLIES
A.F. KITCHEN, INC.	_K_ITCHEN	A.	F.	INC.
MR. LANNY FARM SUPPLIES	_M_R.	LANNY	FARM	SUPPLIES

(Note: A letter or unit underlined indicates the alphabetic filing sequence.)

INDEXING IDENTICAL BUSINESS NAMES

EXAMPLES

	ALPHABETIC FILING ORDER		IDENTIFYING ELEMENTS
	1	2	
CHURCH'S CHICKEN **111 DOW DRIVE** **ATHENS, TEXAS 79904**	**CHURCH ('S)**	**CHICKEN**	**111 DOW DRIVE** **ATHENS, TEXAS 79904**
CHURCH'S CHICKEN **235 FERN CIRCLE** **BILOXI, MS 39580**	**CHURCH ('S)**	**CHICKEN**	**235 FERN CIRCLE** **BILOXI, MS 39580**
CHURCH'S CHICKEN **1021 PASTURETTI ST.** **PASCAGOULA, MS 39775**	**CHURCH ('S)**	**CHICKEN**	**1021 PASTURETTI ST.** **PASCAGOULA, MS 39775**
CHURCH'S CHICKEN **15000 PASTURETTI ST.** **PASCAGOULA, MS 39775**	**CHURCH ('S)**	**CHICKEN**	**15000 PASTURETTI ST.** **PASCAGOULA, MS 39775**

INDEXING ARTICLES, PREPOSITIONS, AND CONJUNCTIONS

EXAMPLES

	ALPHABETIC FILING ORDER			
	1	2	3	4
HOUSE OF LEE	HOUSE (OF)	LEE		
OF ALL TIME SHOP	OF	ALL	TIME	SHOP
THE POT SHOPPE	POT	SHOPPE (THE)		

INDEXING ABBREVIATIONS

EXAMPLES

	ALPHABETIC FILING ORDER		
	1	2	3
A.R. INC.	A.	R.	INCORPORATED
BROWN BROS. SHOES	BROWN	BROTHERS	SHOES
GOV'T SUPPLIES	GOVERNMENT	SUPPLIES	

INDEXING SINGLE LETTERS

EXAMPLES

	ALPHABETIC FILING ORDER				
	1	2	3	4	5
A B C NURSERY SCHOOL	A	B	C	NURSERY	SCHOOL
A B PRINTERS	A	B	PRINTERS		
A. C. AIR FILTERS	A	C	AIR	FILTERS	
L-M MANUFACTURERS	L	M	MANUFACTURERS		

INDEXING HYPHENATED BUSINESS NAMES

EXAMPLES

	ALPHABETIC FILING ORDER		
	1	2	3
NORTH-EAST DISTRIBUTORS	NORTH-EAST	DISTRIBUTORS	
OPEN-DOOR SCHOOL	OPEN-	DOOR	SCHOOL
PARTY PAK-AGE	PARTY	PAK-AGE	
QUICK-STOP	QUICK-	STOP	

INDEXING WORDS CONSIDERED AS ONE

EXAMPLES

	ALPHABETIC FILING ORDER			
	1	2	3	4
GM & O RAILROAD	G	M (&)	O	RAILROAD
LAKESIDE SHOPPING CENTER	LAKESIDE	SHOPPING	CENTER	
NORTHEAST TIMES	NORTHEAST	TIMES		

INDEXING NUMBERS & SYMBOLS

EXAMPLES

	ALPHABETIC FILING ORDER			
	1	2	3	4
COURT OF TWO SISTERS RESTAURANT	COURT (OF)	TWO	SISTERS	RESTAURANT
4900 CLUB	FORTY-NINE HUNDRED	CLUB		
19TH CENTURY ANTIQUES	NINETEENTH	CENTURY	ANTIQUES	
ONE SHELL SQUARE	ONE	SHELL	SQUARE	

INDEXING POSSESSIVES

EXAMPLES

	ALPHABETIC FILING ORDER		
	1	2	3
GOLDMAN'S INC.	GOLDMAN ('S)	INCORPORATED	
HOAGIES' SANDWICH SHOP	HOAGIES'	SANDWICH	SHOP
KEN'S PIZZA PALACE	KEN ('S)	PIZZA	PALACE

INDEXING COMPOUND GEOGRAPHIC BUSINESS NAMES

EXAMPLES

	ALPHABETIC FILING ORDER			
	1	2	3	4
BATON ROUGE OIL CO.	BATON	ROUGE	OIL	COMPANY
BAYOU LA FOURCHE DRILLERS	BAYOU	LA FOURCHE	DRILLERS	
BEAR MOUNTAIN RESORT	BEAR	MOUNTAIN	RESORT	
FORT PICKENS MUSEUM	FORT	PICKENS	MUSEUM	
ROCKWOOD SAND CO.	ROCKWOOD	SAND	COMPANY	

INDEXING FOREIGN BUSINESS NAMES

EXAMPLES

	ALPHABETIC FILING ORDER		
	1	2	3
LAS VEGAS VENDORS	LAS VEGAS	VENDORS	
LE MANS JEWELERS	LE MANS	JEWELERS	
LEYTE GULF FISHERIES	LEYTE	GULF	FISHERIES
LIVONIA TRAVEL AGENCY	LIVONIA	TRAVEL	AGENCY
PUERTO LA CRUZ DIVERS	PUERTO	LA CRUZ	DIVERS
RIO DE ORO WOODWORKERS	RIO	DE ORO	WOODWORKERS

CROSS-REFERENCING BUSINESS NAMES

Combined Surnames In A Business Name

EXAMPLES

ORIGINAL	CROSS-REFERENCE
LAMB, KNIGHT, & BLACK	BLACK, LAMB, & KNIGHT ACCOUNTANTS SEE KNIGHT, BLACK, & LAMB ACCOUNTANTS
	KNIGHT, BLACK, & LAMB ACCOUNTANTS SEE KNIGHT, BLACK, & LAMB ACCOUNTANTS

Businesses With More Than One Name

EXAMPLES

ORIGINAL	CROSS-REFERENCE
HOAGIES'	HOAGIES' SANDWICH SHOP SEE HOAGIES'
THE CO-OP	THE CO-OPERATIVE REGISTER SEE THE CO-OP

CROSS-REFERENCING BUSINESS NAMES

Branches Or Affiliates Of Businesses

EXAMPLE

ORIGINAL	CROSS-REFERENCE
THE SOUTHWESTERN COMPANY	THE TIMES-MIRROR CORPORATION SEE THE SOUTHWESTERN COMPANY

Unusual Or Difficult Name Combinations

EXAMPLE

ORIGINAL	CROSS-REFERENCE
LEE JAMES & COMPANY	JAMES, LEE & COMPANY SEE LEE JAMES & COMPANY

CROSS-REFERENCING BUSINESS NAMES

Initials And Abbreviations

EXAMPLE

ORIGINAL	CROSS-REFERENCE
LOUISIANA POWER AND LIGHT COMPANY	L P &L SEE LOUSIANA POWER AND LIGHT COMPANY

Change In A Company Name

EXAMPLE

OLD ORIGINAL	NEW ORIGINAL	CROSS-REFERENCE
ESSO COMPANY, U.S.A.	EXXON COMPANY, U.S.A.	ESSO COMPANY, U.S.A

(Note: Filing cross-references is performed in the same manner as the original.)

UNIT XIII

INDEXING, ALPHABETIZING AND FILING BUSINESS NAMES

ASSIGNMENT SHEET #1--APPLYING RULES FOR BUSINESS NAMES

Directions: Answer the following:

1. In each of the following business names write the first indexing unit.
   - a. Mr. Beau's Tuxedo Shop ________________
   - b. The Arlt Shop ________________
   - c. A to Z Service Center ________________
   - d. Downtown Bar & Lounge ________________
   - e. Mrs. Mary Jones Sewing Center ________________
2. In each of the following business names write the second indexing unit in the space provided.
   - a. 25th Street Grocery ________________
   - b. North Carolina Distributors ________________
   - c. La Petite Candies ________________
   - d. Jennings' Pet Supplies ________________
   - e. #1 Cycles ________________
3. In each of the following business names write the third indexing unit in the space provided.
   - a. Joe Black's of San Antonio ________________
   - b. The Mary Hart Bread Shop ________________
   - c. In Your Eye Amusement Center ________________
   - d. Court of Two Sisters' Restaurant ________________
   - e. 7-11 Serve-Your-Self Market ________________

4. Arrange the business names in questions #1 - #3 in correct alphabetic sequence.

a.

b.

c.

d.

e.

f.

g.

h.

i.

j.

k.

l.

m.

n.

o.

5. Each group of business names is incorrectly filed. Number the names in correct filing order.

a. ______ Mary, C. T. Sewing (Mrs.)
______ Mr. Joe's Shoes
______ Mr. A. J. Magee (and) Son

b. ______ Downtown Shopper
______ Double-D Meat Mkt.
______ D-X Service Station

c. ______ Tater's
______ The Candy Cane
______ Tennis Club

d. ______ Peay Day Park
______ P-L Association
______ P L T

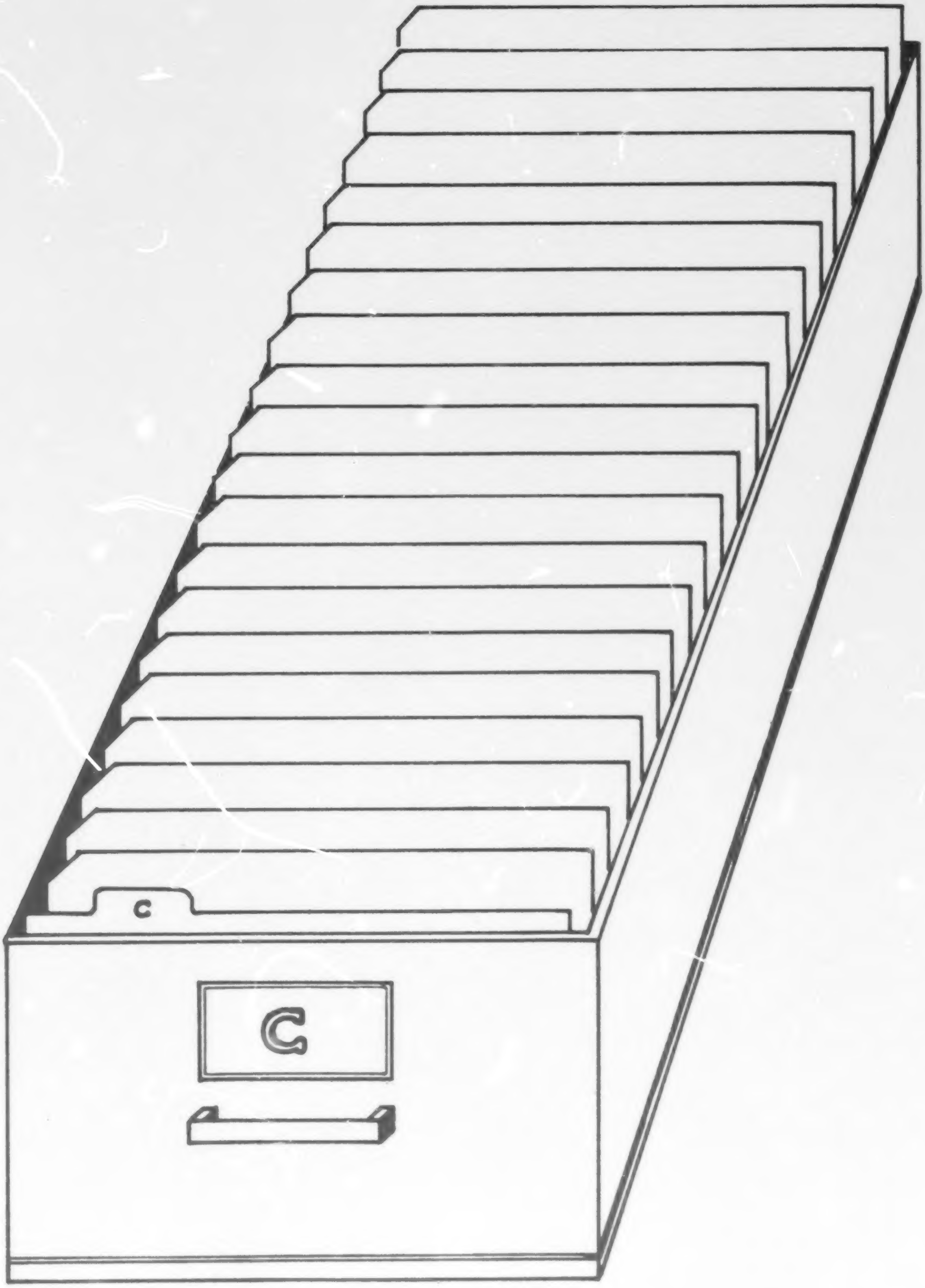
6. In the file pictured on the following page, put the names in the left column among the names in the right column in their correct alphabetical order. Be sure to index first.

LEFT
(Incorrect filing order)

1. Camas Supply Co.
2. Coordinators of Dallas
3. C. D. C. Instruments
4. C-to-it Plumbers
5. Crapanzo Hardware
6. C. C. Carter's Mobile Homes
7. Cathy's Closet
8. Coordinations of Ennis
9. The Craft Shop
10. Carta Blanca Distributors

RIGHT
(Correct filing order)

a. Carter, C.D. Inc.
b. Campbell Paper Company
c. Carter-Benson Food Store
d. Carnahan, Bile (&) Co.
e. Central Lumber Company
f. Circle-R Drive-In
g. Coker'(s) Western Hatters
h. Continental Can Company
i. Cooper, Dallas (and) Son
j. C (&) S Sales Company


C
C

UNIT XIII

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

ASSIGNMENT SHEET #2--CROSS-REFERENCING

Directions: Cross-reference the following business names.

1. Hanes, Holland, & Haynes, Inc.
2. National Cash Register (NCR)
3. Wayne-Lee Grocery
4. Thomas Drugs -- A division of Eckerd Drugs
5. Texas Instruments
6. FBLA
7. Black and Decker
8. CIA
9. McGraw-Hill Book Company
10. Gregg -- A division of McGraw-Hill Book Co.

UNIT XIII

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

1. a. Mr.
   b. Arlt
   c. A
   d. Downtown
   e. Jones
2. a. Street
   b. Carolina
   c. Candies
   d. Pet
   e. Number
3. a. San
   b. Bread
   c. Eye
   d. Sisters' (s)
   e. Serve-
4. a. Arlt Shop (The)
   b. A (to) Z Service Center
   c. Black (s) Joe (of) San Antonio
   d. Court (of) Two Sisters Restaurant
   e. Downtown Bar (&) Lounge
   f. Hart, Mary Bread Shop (The)

g. In Your Eye Amusement Center

h. Jennings' Pet Supplies

i. Jones, Mary (Mrs.) Sewing Center

j. La Petite Candies

k. Mr. Beau ('s) Tuxedo Shop

l. North Carolina Distributors

m. Number One Cycles

n. Seven Eleven Serve Your Self Market

o. Twenty-fifth Street Grocery

5. a. 2
3
1

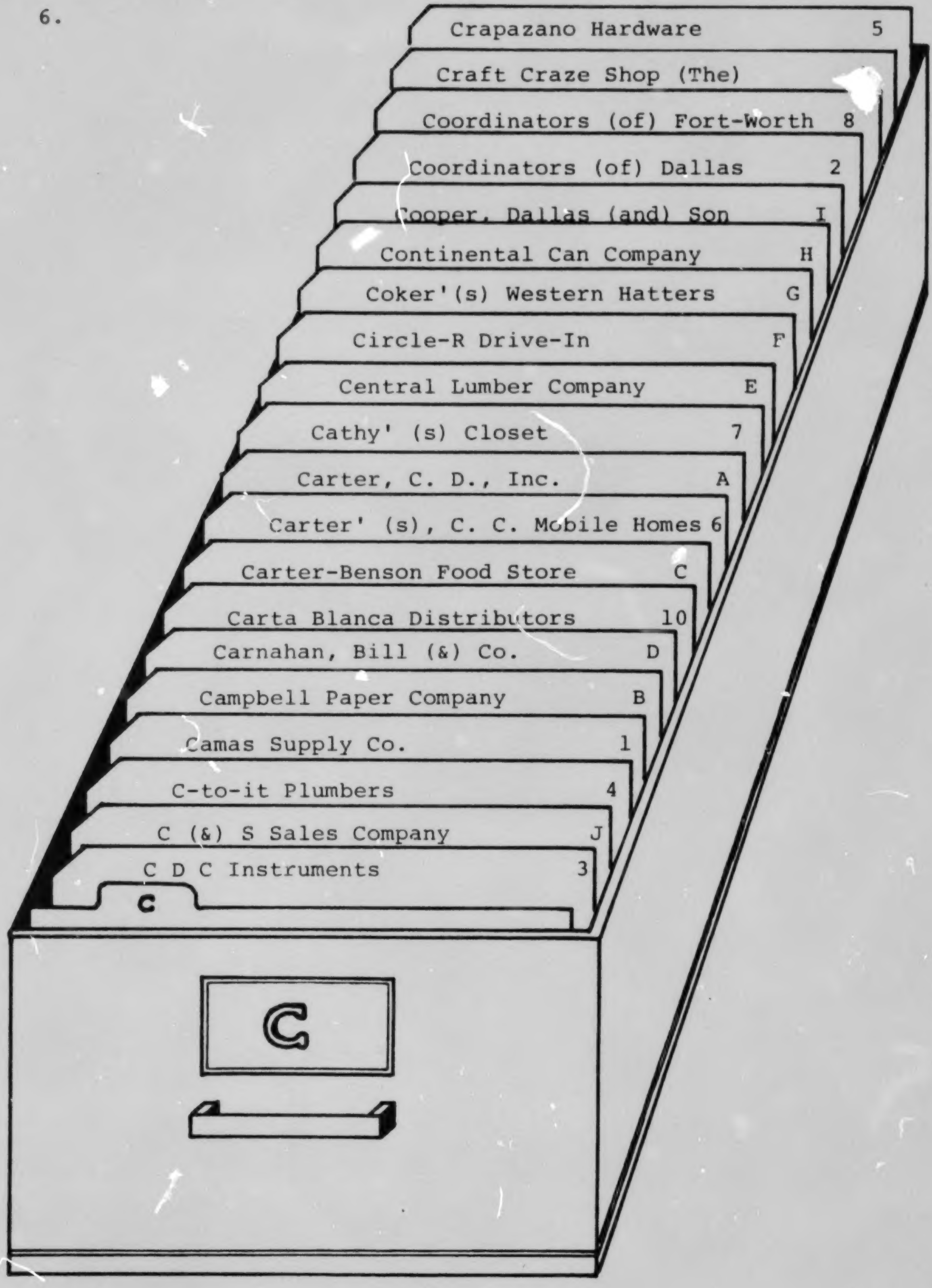
b. 2
1
3

c. 2
1
3

d. 2
1
3

6. Answer is on the following page

6.


Crapazano Hardware 5
Craft Craze Shop (The)
Coordinators (of) Fort-Worth 8
Coordinators (of) Dallas 2
Cooper, Dallas (and) Son I
Continental Can Company H
Coker'(s) Western Hatters G
Circle-R Drive-In F
Central Lumber Company E
Cathy' (s) Closet 7
Carter, C. D., Inc. A
Carter' (s), C. C. Mobile Homes 6
Carter-Benson Food Store C
Carta Blanca Distributors 10
Carnahan, Bill (&) Co. D
Campbell Paper Company B
Camas Supply Co. 1
C-to-it Plumbers 4
C (&) S Sales Company J
C D C Instruments 3
C
C

Assignment Sheet #2

1. Hanes, Holland, & Haynes Inc.

   Cross-reference
   Holland, Haynes & Hanes, Incorporated
   SEE Hanes, Holland, & Haynes, Incorporated

   Haynes, Hanes, & Holland, Incorporated
   SEE Hanes, Holland, & Haynes, Incorporated

2. National Cash Register

   Cross-reference
   NCR
   SEE National Cash Register

3. Wayne-Lee Grocery

   Cross-reference
   Lee, Wayne-Grocery
   SEE Wayne-Lee Grocery

4. Thomas Drugs -- A division of Eckerd Drugs

   Cross-reference
   Eckerd Drugs
   SEE Thomas Drugs

5. Texas Instruments

   Cross-reference
   TI
   SEE Texas Instruments

6. FBLA

   Cross-reference
   FBLA
   SEE Future Business Leaders of America

7. Black and Decker

   Cross-reference
   Decker and Black
   SEE Black and Decker

8. CIA

   Cross-reference
   CIA
   SEE Central Intelligence Agency

9. McGraw-Hill Book Company

Cross-reference
Hill-McGraw Book Company
SEE McGraw-Hill Book Company

10. Gregg -- A division of McGraw-Hill Book Co.

Cross-reference
Gregg
SEE McGraw-Hill Book Company

UNIT XIII

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

JOB SHEET #1--FILING BUSINESS NAMES ON CARDS

1. Equipment and Supplies Required:
   a. Business cards
   b. Scissors
   c. Pen or pencil
2. Procedure: Part A
   a. Cut out each of the names and addresses listed on the business cards.
   b. Code each name by underlining the first indexing unit and numbering the remaining units.
   c. Put the cards in alphabetic order and write their numbers in a list from first to last. (Each card is numbered "A")
   d. Check the alphabetic arrangement of the list with the teacher.

(NOTE: Be sure to refer to the rules when in doubt! Do not cross-reference!)

PART A

Filing Job

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____

3. Procedure: Part B

   a. Turn over the business cards.

   b. Complete filing job using same procedures as in Part A. (Note: Each card is Numbered B.)

PART B

Filing Job

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____

A-1

U. S. Plywood Corp.
120 Louis Street
Anders, Nevada 10135

A-2

Holden's Plumbing Works
1022 Story Street
Cameo, Washington 55444

A-3

Trans-Atlantic Airways
5102 Airline Hwy
Jonesboro, Tennessee 39470

A-4

700 Club
700 7th Avenue
New Orleans, LA 70130

A-5

Trans-Atlantic Oil Co. of
North Carolina
Bank of Orangeburg-Central
Orangeburg, NC 11111

A-6

CDC Industries, Inc.
Fairhope, New York 87099

A-7

International Trade Mart Co.
170 Park Avenue
New York New York 88011

A-8

Holden-Albany Plywood, Inc.
Division of Champion Internatl.
2201 Wirt Street
Camden, Washington 54054

A-9

International Trade Mart Co.
100 Canal Blvd.
New Orleans, LA 70130

A-10

Pepsi-Cola Bottlers
2600 Dallas Street
Denver, Colorado 70003

A-11

Toni's Pizza Parlor
305 South Minosa Drive
Chicago, Illinois 73102

A-12

Isaac Printing Co.
1020 Downing Blvd.
Boston, Massachusetts 60614

A-13

Toni-Brown Plumbing
1022 Bendale
Chicago, Illinois 71302

A-14

International Trade Mart Co.
1511 Tamerlane
Newport, New Jersey 37999

A-15

Tony & Toni Ltd.
901 Ross Dale Blvd.
Brownville, Calif. 10003

A-16

King of the Road Cycles
728 Montgomery
Chicago, Illinois 73102

A-17

Quick Linen Service
521 Richmond Ave.
San Diego, Calif. 74014

A-18

International Trade Mart Co.
1753 Bateman Drive
Tampa, Florida 22331

A-19

People's Life Insurance
1406 Ruston Circle
Boston, Massachusetts 60414

A-20

St. Gabriel Plywood Co.
9315 Stonewall
St. Gabriel, New Jersey 37999

B-1

Goodwill Fix-it Shop
123 Toledo
Gulfport, MS 39470

B-2

Ms. Liberty Hobbies
579 Frederic St.
Mobile, AL 34388

B-3

Shang Hi Lounge
2710 Garden Road
Gulfshores, AL 36608

B-4

U.D.C.
Sun Chapter
Sun, LA 70408

B-5

5-7-9 Shoppe
1010 Harrison Avenue
Atlanta, GA 11908

B-6

Five to Five Coffee Shop
505 Fifth Street
Franklin, MS 78910

B-7

Good Will Endeavors
987 Averett
Pascagoula, MS 55558

B-8

A. L. Rosenblum, Inc.
306 West Thomas
Hammond, LA 70401

B-9

A. L. Rosenblum, Inc.
173 North Columbia Rd.
Bogalusa, LA 70401

B-10

The Three Pigs Fitness Club
999 Wide Street
Fat City, LA 87109

B-11

Southeast Suppliers
2220 Cleary
Liberty, TX 72601

B-12

Madam Joliet of Quebec
1001 Ashton Avenue
Quebec, Canada

B-13

Rosenberg's
1825 Tulane Avenue
New Orleans, LA 71030

B-14

La Huerta
Toledo 25 Torrimar
Guaynabo, Puerto Rico 00742

B-15

U-Can-Do-It Hobbies
1717 Eliabeth
Amarillo, TX 00657

B-16

Sidney Rostenblums, Inc.
10010 Wesley Street
Denham Springs, LA 71777

B-17

West 8th Street Coiffeurs
18 West 8th Street
Galveston, TX 84920

B-18

North West Placement Office
1029 N. Leverett
Beaumont, TX 72701

B-19

A. L. Rosenblum, Inc.
21 Main Street
Covington, LA 70888

B-20

U. S. Paper Corporation
1717 West Capital
Jackson, MS 77112

UNIT XIII

INDEXING, ALPHABETIZING AND FILING BUSINESS NAMES

ANSWERS TO JOB SHEET #1

Job Sheet - Part A

1	2	3	4	5 and/or Identifying Elements
A-8x Albany	Holden-	Plywood	Incorporated	Division (of) Champion International 2201 Wirt Street Camden, Washington 54054
A-13x Brown	Toni-	Plumbing		1022 Bendale Chicago, Illinois 71302
A-6 C	D	C	Industries, Inc.	Fairhope, New York 87079
A-8 Holden-	Albany	Plywood	Incorporated	Division (of) Champion International 2201 Wirt Street Camden, Washington 54054
A-2 Holden'(s)	Plumbing	Words		1022 Story Street Camden, Washington 55444
A-9 International	Trade	Mart	Company	100 Canal Boulevard New Orleans, LA 70130
A-7 International	Trade	Mart	Company	170 Park Avenue New York, NY 88011
A-14 International	Trade	Mart	Company	1511 Tamerlane Newport, NJ 37999
A-18 International	Trade	Mart	Company	1733 Bateman Drive Tampa, FL 22334
A-12 Isaac	Printing	Company		1020 Downing Boulevard Boston, Massachusetts 60614

1	2	3	4	5 and/or Identifying Elements
A-16 King(of)(the)	Road	Cycles		728 Montgomery St. Chicago, Illinois 73102
A-19 People'(s)	Life	Insurance		1406 Ruston Circle Boston, Massachusetts 60414
A-10 Pepsi-	Cola	Bottlers		2600 Dallas Street Denver, Colorado 70003
A-17 Quick	Linen	Service		521 Richmond Avenue San Diego, California 74014
A-20 Saint	Gabriel	Plywood	Company	9315 Stonewall St. Gabriel, New Jersey 37999
A-4 Seven Hundred	Club			700 7th Avenue New Orleans, LA 70130
A-13 Toni-	Brown	Plumbing		1022 Bendale Chicago, Illinois 71302
A-11 Toni'(s)	Pizza	Parlor		3055 Mimosa Chicago, Illinois 71302
A-15x Toni	Tony(&)	Limited		901 Ross Dale Boulevard Brownville, Georgia 10003
A-15 Tony(&)	Toni	Limited		901 Ross Dale Boulevard Brownville, Georgia 10003
A-3 Trans-Atlantic	Airways			5102 Airline Highway Jonesboro, Tennessee 39470
A-5 Trans-Atlantic	Oil	Company(of)	North Carolina	Bank(Of)Orangeburg Central Orangeburg, North Carolina 11111

1	2	3	4	5 and/or Identifying Elements
A-1 United	States	Plywood	Corporation	120 Louis Lane Anders, Nevada 10135

Job Sheet - Part B

1	2	3	4	5 and/or Identifying Elements
B-6 Five(to)	Five	Coffee	Shop	505 Fifth St. Franklin, MS 78910
B-5 Five	Seven	Nine	Shop	1010 Hamson Avenue Atlanta, GA 11908
B-7 Goodwill	Endeavors			987 Averett Pascagoula, MS 55558
B-1 Goodwill	Fix	it	Shop	123 Toledo Golfport, MS 39470
B-14 La Huerta				Toledo 25 Torrimar Guaynabo, Puerto Rico 00742
B-12 Madame	Joliet(of)	Quebec		1001 Ashton Avenue Quebec, Canada
B-2 Ms.	Liberty	Hobbies		579 Frederic St. Mobile, AL 34388
B-18 Northwest	Placement	Office		1029 N. Leverett Beaumont, TX 72701
B-13 Rosenberg's				1825 Tulane Ave. New Orleans, LA 70130
B-9 Rosenblum	A.	L.	Incorporated	173 N. Columbia Rd. Bogalusa, LA 70423
B-19 Rosenblum	A.	L.	Incorporated	21 Main Street Covington, LA 70888
B-8 Rosenblum	A.	L.	Incorporated	306 West Thomas Hammond, LA 70401
B-16 Rostenblums	Sidney	Incorporated		10010 Wesley St. Denham Spgs., LA 71777

1	2	3	4	5 and/or Identifying Elements
B-3 Shang	Hi	Lounge		2710 Garden Rd. Gulfshores, AL 36608
B-11 Southeast	Supplies			2220 Cleary Liberty, TX 72601
B-10 Three	Pigs	Fitness	Club(The)	999 Wide St. Fat City, LA 87109
B-15 U	Can	Do	It	Hobbies 1717 Elizabeth Amarillo, TX 00651
B-4 U	D	C		Sun Chapter Sun, LA 70408
B-4x United	Daughters (of)(the)	Confederacy		Sun Chapter Sun, LA 70408
B-20 United	States	Paper	Corporation	1717 W. Capital Jackson, MS 77112
B-17 West	8(Eighth)	Street	Coiffeurs	18 West 8th St. Galveston, TX 84920

UNIT XIII

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

UNIT TEST

1. Place a (✓) beside those statements that are true when indexing personal names contained in business names.

_____ a. Each word is considered a separate indexing unit.

_____ b. The name is transposed with the given name being the first in order.

_____ c. Titles followed by a single given name are separate indexing units.

2. Arrange the steps for indexing identical business names in proper order. Use numbers 1-4

_____ a. When all units in business names are identical, look at the addresses for identifying elements.

_____ b. When business names are identical, look at the city or town first.

_____ c. If city names for business are the same, next look at the state names.

_____ d. If addresses of identical business names are in the same city, alphabetize the addresses.

3. Discuss the rule for indexing business names with articles. Place a (✓) beside true statement on indexing articles, prepositions, and conjunctions.

_____ a. Articles are considered as indexing units.

_____ b. Conjunctions and prepositions should be put in parentheses.

_____ c. When a preposition is the first word of a business name, it is the last indexing unit.

4. Explain how to index abbreviations.

5. List the three rules pertaining to single letters in business names.

   a.

   b.

   c.

6. Circle the letters next to those statements that are true concerning indexing hyphenated business names.

   a. Hyphens are never ignored and the hyphenated word is considered one indexing unit.

   b. Two parts of a word joined by a hyphen are considered one indexing unit.

   c. A hyphenated "coined" word is considered one indexing unit.

7. Explain how to index words used as one word.

8. Place a (✓) beside true statements on indexing numbers and symbols.

   _____ a. Numbers are never spelled out for indexing in a business name.

   _____ b. The complete number is used as one word.

   _____ c. When a number is with a symbol, only the number is a separate indexing unit.

9. Explain how to index words with possessives.

10. Discuss how compound geographic business names can be both one indexing unit and separate indexing units.

11. State the three rules for indexing foreign business names.

    a.

    b.

    c.

12. Place a "✓" beside those statements that are true when cross-referencing business names.

    _____a. When there are combined surnames in a bussiness name, a cross-reference is prepared only for the first surname.

    _____b. With businesses having more than one name, the original index is filed under the name in which it conducts its business.

    _____c. When a company uses an abbreviated form of the name, the original is indexed under the full name.

    _____d. When a business has branches or affiliates of business, the cross-reference index is made under the name of the parent company.

    _____e. When a business name combination is hard or unusual, the original is indexed as it is written.

    _____f. When working with initials and abbreviations, the original is indexed under the initial or abbreviation.

    _____g. When there is a change in the company name, the cross-reference is made under the old name.

13. Demonstrate the ability to:

    a. Index, alphabetize, and file names and correct misfilings.

    b. Cross-reference business names.

    c. Index, alphabetize, and file business names on cards.

    (NOTE: If these activities have not been completed prior to the test, ask the instructor when they should be completed.)

UNIT XIII

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

ANSWERS TO UNIT TEST

1. __✓__ a.
   ______ b.
   __✓__ c.

2. __1__ a.
   __2__ b.
   __3__ c.
   __4__ d.

3. ______ a.
   __✓__ b.
   ______ c.

4. Abbreviations are indexed as if they were written in full, unless the exact meaning is not known. When in doubt, index it as it is written.

5. a. Each letter or initial is a separate indexing unit.

   b. A single letter precedes a word that begins with that letter.

   c. Hyphens and spacing between letters are ignored.

6. a.

   b.

   c.

7. Words written as one or two words which are often considered as one word are indexed as a single unit.

8. ______ a.
   __✓__ b.
   ______ c.

9. When words within a name have an apostrophe, all the letters in that word up to the apostrophe are considered in indexing. When an s follows the apostrophe, it is not considered in indexing.

10. When the name contains two words, each is a separate indexing unit. When written as one word, the name is considered as one indexing unit.

11. a. Each word is a separate indexing unit.

    b. A foreign particle or prefix is considered with the word following it.

    c. Unusual foreign names are indexed as they are written.

12. ______ a.

    ______ b.

    __✓__ c.

    __✓__ d.

    ______ e.

    ______ f.

    __✓__ g.

13. Evaluated to the satisfaction of the instructor.

UNIT XIV

FILING MATERIALS GEOGRAPHICALLY

UNIT OBJECTIVE

After completing this unit of instruction, the student should be able to determine geographic filing divisions, identify advantages and disadvantages of geographic filing, and demonstrate the ability to utilize geographic filing procedures. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student should be able to:

1. Identify factors that determine divisions in geographic filing
2. List the types of guides used in geographic filing
3. Discuss the difference in using miscellaneous and individual folders used in geographic filing
4. List the features of a card index used in geographic filing
5. Name the types of cross-references in geographic filing
6. Sequence procedures used in geographic filing
7. Sort guide information in geographic filing
8. Identify advantages of geographic filing
9. List advantages of geographic filing
10. Determine filing divisions of a geographic file
11. Use geographic filing in certain cases
12. Demonstrate the ability to arrange a file drawer geographically

UNIT XIV

FILING MATERIALS GEOGRAPHICALLY

SUGGESTED ACTIVITIES

I. Instructor:

   A. Provide objective sheet
   B. Discuss objective sheet
   C. Provide information sheet
   D. Discuss information sheet
   E. Make and show transparency
   F. Provide assignment sheets
   G. Discuss assignment sheets
   H. Provide job sheets
   I. Provide additional jobs in applicable exercise papers
   J. Discuss additional jobs in applicable exercise papers
   K. Give test and evaluate results

II. Student:

   A. Read objective sheet
   B. Discuss objective sheet
   C. Read information sheet
   D. Discuss information sheet
   E. View transparency
   F. Read assignment sheets
   G. Complete assignment sheets
   H. Complete job sheets
   I. Complete additional jobs in applicable exercise papers

J. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objectives

  B. Information sheet

  C. Transparency masters

    1. TM-1--Geographic Arrangement of Guides and Folders

    2. TM-2--Steps in Geographic Filing of Correspondence

  D. Assignment sheets

    1. Assignment Sheet #1--Determining Divisions

    2. Assignment Sheet #2--Utilizing Geographic Filing

    3. Assignment Sheet #3--Arranging a File Drawer Geographically

  E. Answers to assignment sheets

  F. Answers to job sheet

  G. Test

  H. Answers to test

II. References:

  A. Books:

    1. Bassett, Ernest D. and David G. Goodman. Business Filing and Records Control. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

    2. Gregg, John Robert and others. Applied Secretarial Practice. 7th ed. Dallas, Texas: Gregg Division, McGraw-Hill Book Company, 1974.

    3. Kahn, Gilbert and others. Progressive Filing. 8th ed. New York, N.Y.: McGraw-Hill Book Company, 1969.

4. Meehan, James R. and others. *Clerical Office Procedures*. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

5. ________________. *Secretarial Office Procedures*. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

6. Sherster, Joyce. *File Clerk*. New York, N.Y.: McGraw-Hill Book Company, 1973.

7. Wood, Merle W. and Margaret A. McKenna. *The Receptionist*. New York, N.Y.: McGraw-Hill Book Co., 1966.

B. Practice Sets:

   1. Bassett, Ernest D. and David G. Goodman. *Office Filing Procedures*. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

   2. Kahn, Gilbert and others. *Gregg Quick Filing Practice*. New York, N.Y.: McGraw-Hill Book Company, 1969.

C. Workbooks:

   1. Guthrie, Mearl R. *Alphabetic Indexing*. Cincinnati, Ohio: South-Western Publishing Co., 1964.

   2. Wood, Merle W. *Number Filing on the Job*. Cincinnati, Ohio: South-Western Publishing Co., 1972.

UNIT XIV

FILING MATERIALS GEOGRAPHICALLY

INFORMATION SHEET

I. Things to look at for divisions in geographic file

  A. Type of business

  B. Geographical areas of correspondence

  C. Use of files

II. Types of guides

  A. Primary guides--names of the largest or most important geographic areas, such as states or provinces

  B. Secondary guides--smaller part of an area in the primary guides, such as cities or counties in a state or province

III. Folders for filing materials

  A. Miscellaneous folders

    1. Used for every guide

    2. Labeled the same as the guide and having all miscellaneous correspondence for the locality

    3. Alphabetized by state and city

  B. Individual folders

    1. Used when five or more pieces of correspondence are received from one correspondent

    Example: Correspondence from a salesman at a branch office

    2. Correspondence within the individual folder is arranged by date, with the latest date in front

  C. All folder labels--should be the same and contain the following:

    1. The location of the correspondent on the first line

        2. The name of the correspondent on the second line

IV. Features of a card index in geographic filing

    A. Arranged alphabetically by names of correspondents

    B. Used as a quick reference when the geographic location cannot be remembered

V. Types of cross-references in geographic filing

    A. Not likely to occur again--use cross-reference sheet.

    B. Permanent--manila tabbed cross-reference form is used.

    C. From individual to a location--card index must be used.

VI. Geographic filing procedure

    A. Read correspondence

    B. Code--correspondence location marked first

    C. Cross-reference correspondence

    D. Sort correspondence by location first

    E. Check card file

    F. File in usual manner

VII. Charge-out Procedure

    A. Place OUT indicator in file in place of folder

    B. Fill in OUT guide information to include:

        1. what was taken

        2. who took it

        3. when it was taken

        4. when it will be returned

    C. Use follow-up system to make sure that papers are returned to file

VII. Advantages of geographic filing

  A. Can use direct filing and shows reference for geographic areas

  B. Can use miscellaneous records

  C. Can use grouping of records by location

VIII. Disadvantages of geographic filing

  A. Must show location as well as name

  B. Must use triple sorting

  C. Increases labor costs

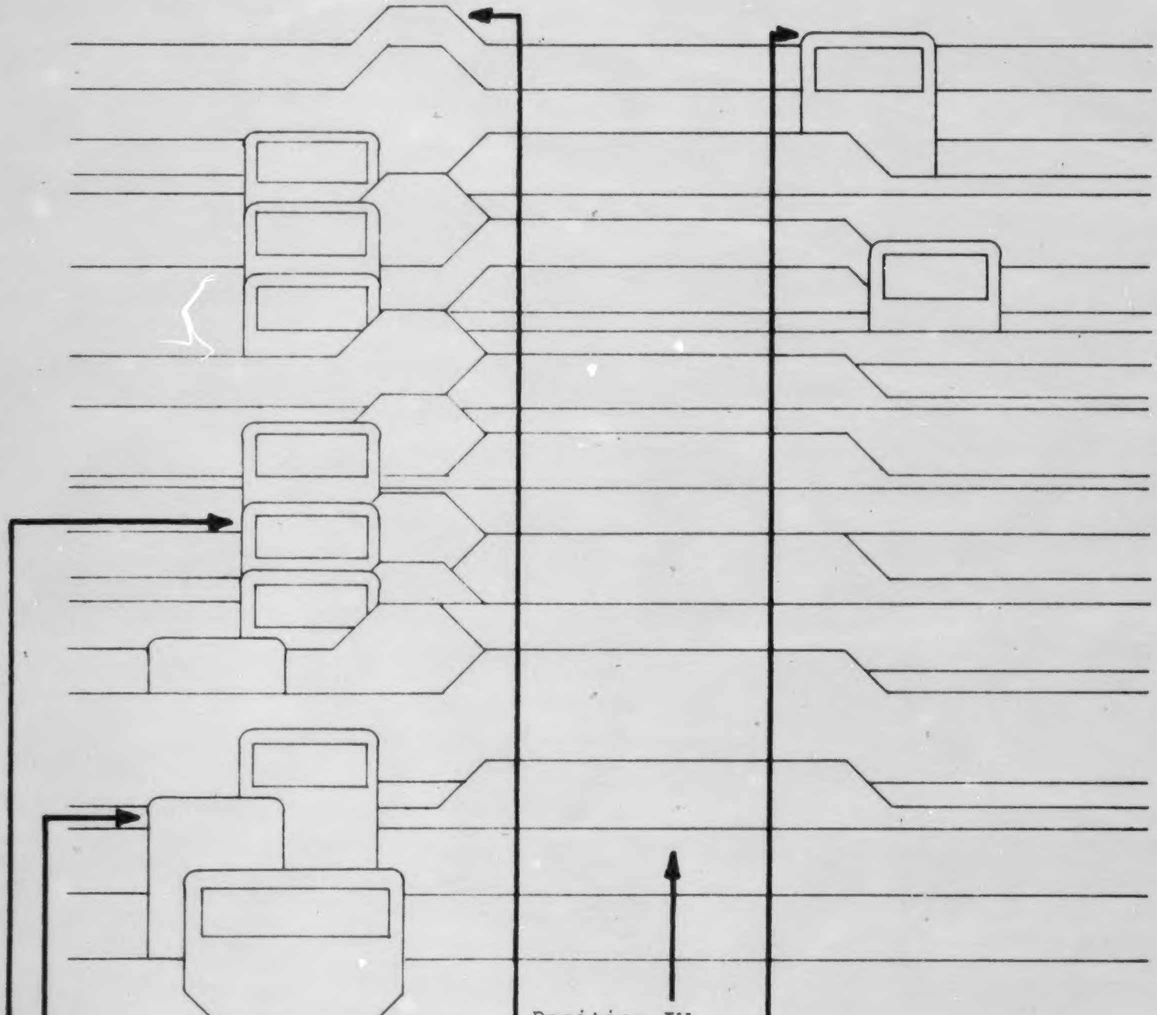
  D. Increases risk of error

  E. Must set up reference card index

  F. Must use detailed descriptions on folder labels

  G. Creates confusion in miscellaneous files

GEOGRAPHIC ARRANGEMENT OF GUIDES AND FOLDERS



Position IV individual folders

Position I alphabetic and state guides

Position V out and special guides

Position III city or town miscellaneous folders and miscellaneous state folders

Position II city or town guides and some alphabetic subdivisions

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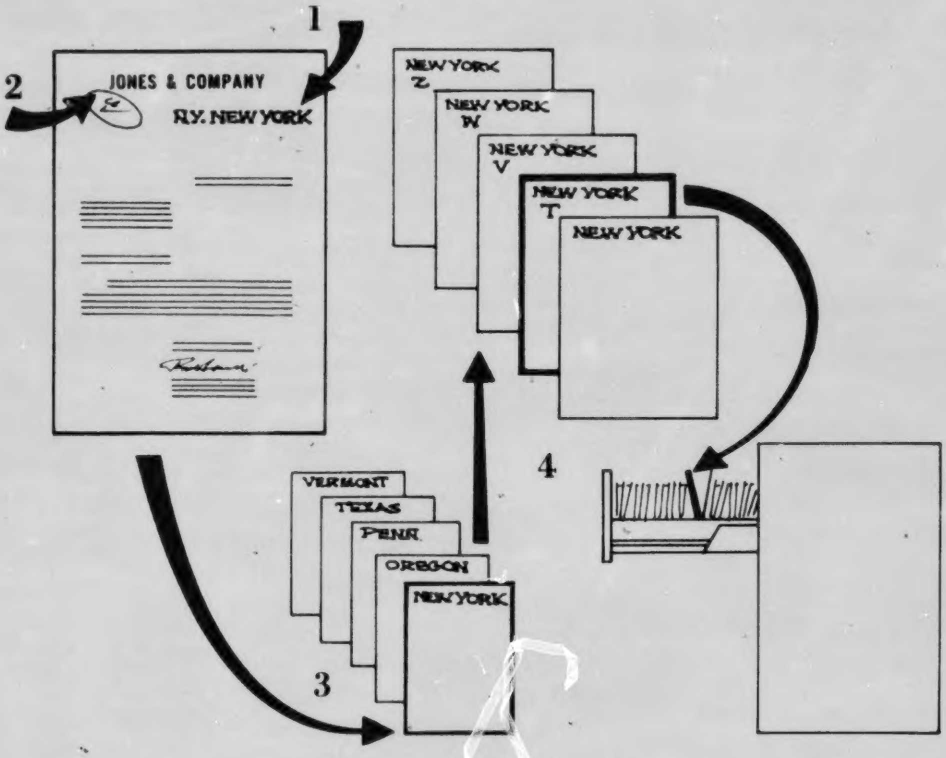
STEPS IN GEOGRAPHIC FILING OF CORRESPONDENCE


1
2
JONES & COMPANY
N.Y. NEW YORK
NEW YORK Z
NEW YORK W
NEW YORK V
NEW YORK T
NEW YORK
4
VERMONT
TEXAS
PENN
OREGON
NEW YORK
3

1. Inspecting. Correspondence is checked to make sure it is ready for filing.

2. Indexing and Coding. The name of the correspondent and location under which the record is to be filed are determined. Some file workers underline the name and circle the location. Names for cross-referencing should be selected and coded also.

3. Sorting. Records are divided first by main geographic division.

   Then these main units are divided into geographic subdivisions.

4. Storing. The state and city or town guides are used to locate the folder section rapidly. The section is then searched for an individual folder for the coded name. If there is none, the record is put in a miscellaneous folder.

UNIT XIV

FILING MATERIALS GEOGRAPHICALLY

ASSIGNMENT SHEET #1--DETERMINING DIVISIONS

Directions: Read the following case situation and answer the questions.

Crown, Inc., is a large paper mill which has branches across all of the southern states. Correspondence comes in daily from the branches and has been filed in an alphabetic filing system. The office supervisor now feels that arrangement of branch correspondence is needed.

Questions

1. What are the three factors in determining divisions?

2. What possible divisions could be made?

3. Could a card index be used? Explain.

UNIT XIV

FILING MATERIALS GEOGRAPHICALLY

ASSIGNMENT SHEET #2--UTILIZING GEOGRAPHIC FILING

1. If a business has branches all over the United States, what would be the primary guide?

2. If a business has branches in only one state, what would be the primary guide?

3. Would a business that has a salesperson use a geographic file? Explain.

UNIT XIV

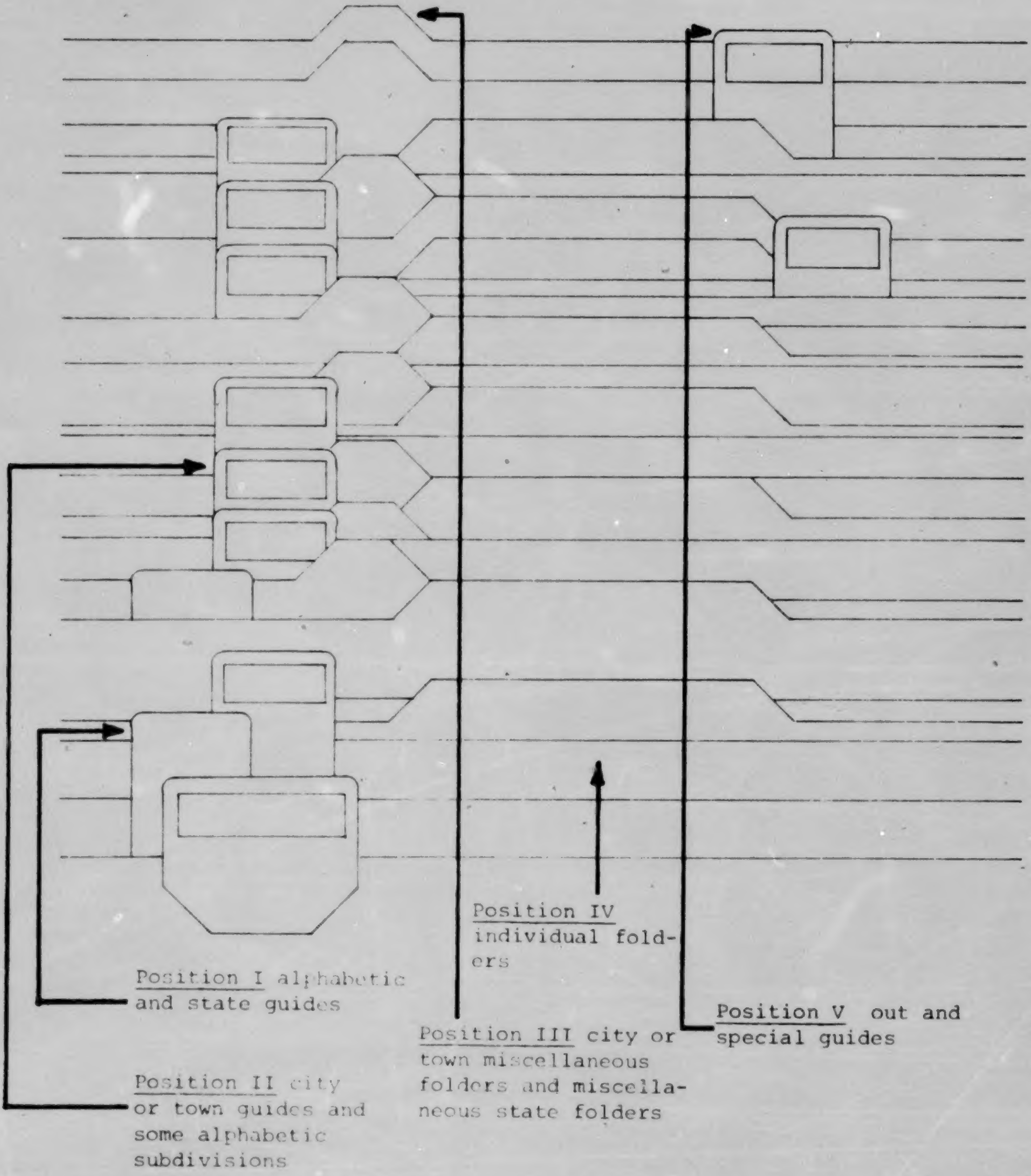
FILING MATERIALS GEOGRAPHICALLY

ASSIGNMENT SHEET #3--ARRANGING A FILE DRAWER GEOGRAPHICALLY

Directions: Using the illustration on the next page and the information below, label in which position the information belongs.

1. The letter of the alphabet A Position ______
2. The state of Massachusetts Position ______
3. Boston Position ______
4. The Boston Globe-News Position ______
5. Boston Sales Incorporated Position ______
6. Miscellaneous correspondence from the city of Boston Position ______
7. New news release from the Boston Globe-News Position ______
8. Record of material taken out of the files Position ______
9. The town of Cambridge Position ______
10. Miscellaneous correspondence from the state of Texas Position ______

GEOGRAPHIC ARRANGEMENT OF GUIDES AND FOLDERS



Position IV individual folders

Position I alphabetic and state guides

Position V out and special guides

Position III city or town miscellaneous folders and miscellaneous state folders

Position II city or town guides and some alphabetic subdivisions

UNIT XIV

FILING MATERIALS GEOGRAPHICALLY

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

1.
    a. Type of business--large paper mill
    b. Geographic area of correspondence--southern states
    c. Way files are to be used--arrange branch correspondence
2.
    a. State names--primary guide
    b. City names--secondary guide
    c. Branch names--individual folder
3. Yes, for if a card index is not used, there is a chance that the geographic location of a branch is forgotten.

Assignment Sheet #2

1. States
2. Cities
3. Yes, salesmen are usually assigned to certain geographic areas. It would be easier to file by these geographic areas than trying to remember every salesman's name.

Assignment Sheet #3

1. I
2. I
3. II
4. IV
5. IV
6. III
7. V -- Special Guide
8. V -- Out Guide
9. II
10. III

UNIT XIV

FILING MATERIALS GEOGRAPHICALLY

UNIT TEST

1. Place a "✓" beside factors used in determining divisions in geographic filing.

_____ a. Type of business

_____ b. Telephone number of business

_____ c. Geographical area

_____ d. Use of files

_____ e. Employees in business concern

2. List the two types of guides used in geographic filing.

a.

b.

3. Discuss the difference in using a miscellaneous and individual folders used in geographic filing.

4. Write the features of a card index used in geographic filing.

5. List the three types of cross-references in geographic filing.

6. Put the steps in geographic filing in correct order, using numbers 1 through 6.

_____ Sort correspondence by location first

_____ Inspect correspondence

_____ Code correspondence

_____ Cross-reference correspondence

_____ Check card file

_____ File geographically

7. Place a "✓" beside those statements that are points to be included in an OUT guide.

_____ a. When folder was taken

_____ b. Who took the folder

_____ c. When the folder will be returned

_____ d. What information from folder was taken

_____ e. Address of individual using folder

_____ f. How much the folder costs

8. Identify the advantages when using a geographic file by placing a "✓" beside the correct statements.

_____ Requires location as well as name

_____ Permits grouping of records by location

_____ Requires cross-reference index

_____ Provides for miscellaneous records

_____ Allows reference for geographic areas

9. List disadvantages of geographic filing.

10. Determine filing division of a geographic file.

11. Utilize geographic filing in certain circumstances.

12. Demonstrate the ability to arrange a file drawer geographically.

(NOTE: If activities #10, #11, and #12 have not been accomplished prior to the test, ask the instructor when they should be completed.)

UNIT XIV

FILING MATERIALS GEOGRAPHICALLY

ANSWERS TO UNIT TEST

1.

   a. Type of business concern

   b. Geographical area of correspondence

   c. Manner in which files are to be used

2. Primary guides--names of the largest and most important geographic divisions

   Secondary guides--subdivisions of the divisions in the primary guides

3. Miscellaneous folder--used for every guide and contains all miscellaneous correspondence

   Individual folder--used when five or more pieces of correspondence are received from one correspondent in a geographic area

4.

   a. Arranged alphabetically by names of correspondents

   b. Used as a quick reference when the name of the geographic area cannot be remembered

5.

   a. Not likely to occur again

   b. Permanent

   c. From individual to a location

6. 4 Sort correspondence by location first

   1 Inspect correspondence

   2 Code correspondence

   3 Cross-reference correspondence

   5 Check card file

   6 File geographically

7. ✓ a.
   ✓ b.
   ✓ c.
   ✓ d.
   e.
   f.

8. Requires location as well as name
   ✓ Permits grouping of records by location
   Requires cross-reference index
   ✓ Provides for miscellaneous records
   ✓ Allows reference for geographic areas

9.
   a. Requires location as well as name
   b. Requires triple sorting
   c. Increases labor costs
   d. Increases risk of error
   e. Requires reference card index
   f. Requires detailed description on folder labels
   g. Creates confusion in miscellaneous files

10. Evaluated to the satisfaction of the instructor

11. Evaluated to the satisfaction of the instructor

12. Evaluated to the satisfaction of the instructor

UNIT XV

FILING MATERIALS NUMERICALLY

UNIT OBJECTIVE

After completing this unit, the student should be able to discuss the advantages and disadvantages of numeric filing, explain the basic features of a numeric file, list the steps in numeric filing, and file correspondence numerically. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student should be able to:

1. Match terms associated with filing materials numerically to the correct definition
2. Discuss the advantages and disadvantages of numeric filing
3. Identify correct features of a numeric file
4. List in order the steps involved in the numeric filing procedure
5. List other numeric filing methods
6. Demonstrate the ability to:
    a. Place materials in numeric order
    b. Use a numeric card file system
    c. Log an accession book
    d. File, using terminal numbers

UNIT XV

FILING MATERIALS NUMERICALLY

SUGGESTED ACTIVITIES

I. Instructor:

   A. Provide objective sheet

   B. Discuss objective sheet

   C. Provide information sheet

   D. Discuss information sheet

   E. Explain and demonstrate filing materials numerically

   F. Provide assignment sheets

   G. Discuss assignment sheets

   H. Give test and evaluate results

II. Student

   A. Read objective sheet

   B. Participate in discussion of objective sheet

   C. Read information sheet

   D. Participate in discussion of information sheet

   E. Participate in explanation and demonstration of filing materials numerically

   F. Read assignment sheets

   G. Complete assignment sheets

   H. Take test

INSTRUCTION MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

C. Transparency masters

1. XV-TM-1--Numeric Filing Procedure
2. XV-TM-2--Coding and Storing Correspondence Numerically
3. XV-TM-3--Accession Book
4. XV-TM-4--Terminal Digit Filing
5. XV-TM-5--Index Card Control File

D. Assignment sheets

1. Assignment Sheet #1--Placing Materials in Numeric Order
2. Assignment Sheet #2--Using Numeric Card File System
3. Assignment Sheet #3--Logging An Accession Book
4. Assignment Sheet #4--Using Terminal Numbers in Filing

E. Answers to assignment sheets

F. Test

G. Answers to test

II. References:

A. Books

1. Bassett, Ernest D. and David G. Goodman. Business Filing and Records Control. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.
2. Gregg, John Robert and others. Applied Secretarial Practices. 7th ed. New York, New York: Gregg Division, McGraw-Hill Book Company, 1974
3. Kahn, Gilbert and others. Progressive Filing. 8th ed. New York, New York: McGraw-Hill Book Company, 1969.
4. Meehan, James R. and others. Clerical Office Procedures. 5th ed. Cincinnati, Ohio: South-Western Publishing Company, 1973.

5. Meehan, James R. and others. Secretarial Office Procedures. 8th ed. Cincinnati, Ohio: South-Western Publishing Company, 1972.

6. Sherster, Joyce. File Clerk. New York, New York: McGraw-Hill Book Company, 1973.

7. Wood, Merle W. and Margaret A. McKenna. The Receptionist. New York, New York: McGraw-Hill Book Company, 1966.

B. Additional References

1. Practice Sets

   a. Bassett, Ernest D. and David G. Goodman. Office Filing Procedures. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

   b. Kahn, Gilbert and others. Gregg Quick Filing Practice. New York, New York: McGraw-Hill Book Company, 1965.

   c. Kahn, Gilbert and others. Progressive Filing Practice Set. New York, New York: McGraw-Hill Book Company, 1969.

2. Workbooks

   a. Guthrie, Mearl R. Alphabetic Indexing. Cincinnati, Ohio: South-Western Publishing Company, 1964.

   b. Wood, Merle W. Number Filing on the Job. Cincinnati, Ohio: South-Western Publishing Co., 1972.

UNIT XV

FILING MATERIALS NUMERICALLY

INFORMATION SHEET

I. Definition of terms

A. Numeric filing--A method of filing by numbers instead of names

B. Numeric file--One which contains guides and folders with numbers on each

C. Alphabetic miscellaneous file--File which has alphabetically filed papers of correspondents who have not been assigned numbers.

D. Card file (card index)--File which has the names of correspondents and any subjects alphabetically arranged

E. Register--A book which contains the numbers given to correspondents and subjects. It shows the next number to be used.

F. Terminal-digit file--File in which numbers are read in groups from right to left rather than left to right

G. Consecutive-number file (serial-number file)--File in which a number is assigned to each correspondent or subject that has an individual folder

II. Advantages and disadvantages of numeric filing

A. Advantages

1. Provides an easier way of filing and refiling policy or case numbers in insurance companies, law firms, and welfare agencies; contract, job, or stock numbers or firms in building trades; purchase orders, sales orders, charges or payments on account in all companies; and in state office (automobile license files; Social Security files).

2. Makes additions easy and unlimited.

3. Transfer of inactive records is easier

4. Cross-references do not crowd file drawer

5. Keeps privacy of information contained in a file

6. Fewer errors may occur, as in matching invoices and payments

7. Names and addresses are quickly and easily obtained from the card file

8. Labeling is fast and easy

9. Misfiled folders are easily caught

B. Disadvantages

1. In cases before records can be obtained, the worker must refer to an alphabetic card file to find the number assigned to the name of the subject

2. Crossing numbers may easily occur

3. More equipment is necessary

4. Two methods of filing are involved

5. Time in sorting is wasted

III. Basic features of a numberic file

A. Main numeric file--one which has guides and individual folders with numeric titles

1. Characteristics

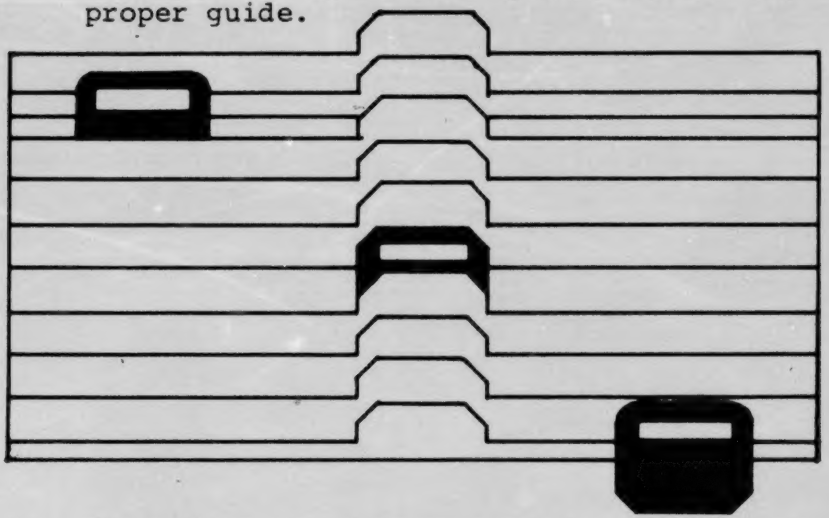
a. A number is assigned consecutively to each correspondent or subject that has an individual folder

b. Once a number is assigned, it is kept until a correspondent no longer does business with a firm or when no further work is to be done

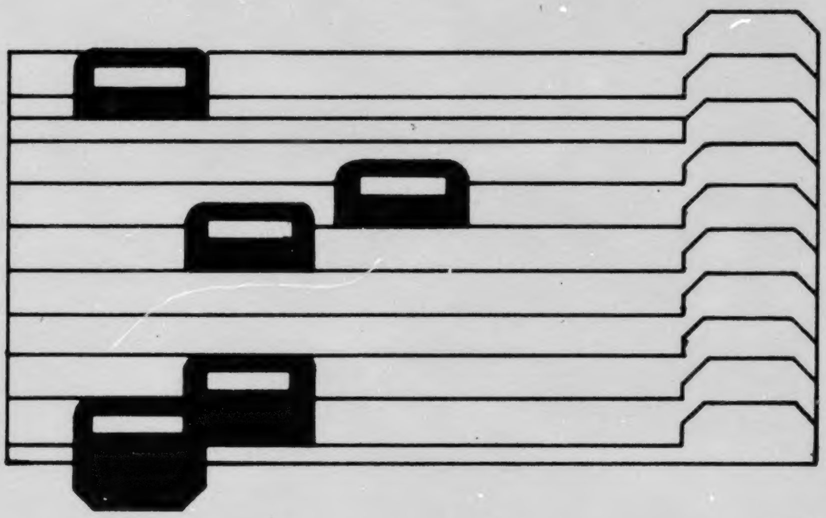
c. All papers of a correspondent or subject are placed in the individual folder which has the number given that correspondent or subject

2. Methods of arranging guides and folders

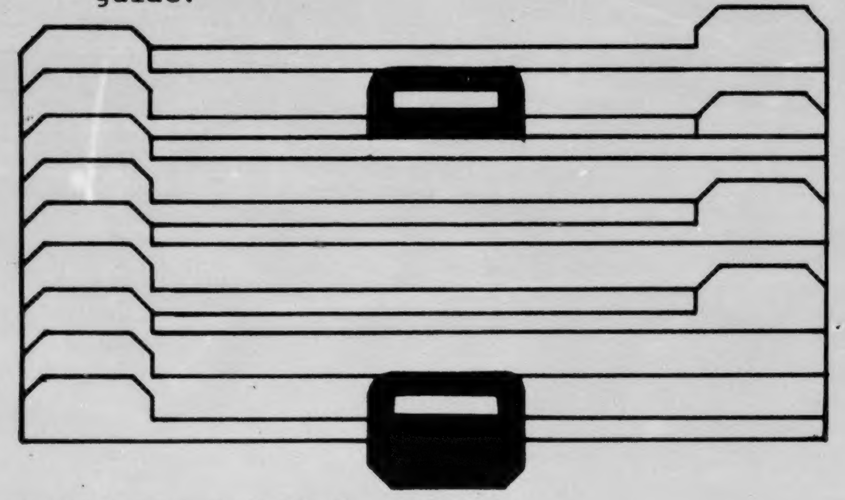
   a. The guides are put in three positions across the file drawer, and the folders are arranged in numerical sequence behind the proper guide.



   b. The guides are in two or three positions at the left only and the folders with tabs are in the last position on the right.



c. The guides appear in the center only, and the folders with tabs are used in two positions to the right and the left of the guide.



B. Miscellaneous alphabetic file

1. Correspondents or subjects with less than five papers are filed alphabetically in the miscellaneous file.

2. Location may be in one of the following

   a. In the front part of the first filing drawer of the main numeric file

   b. In a separate drawer of the main numeric file

   c. In an entirely separate filing cabinet

3. Transfering to the main numeric file

   a. Includes correspondents or subjects with five or more papers

   b. The first unused number is assigned to that correspondent or subject.

   c. Papers are put into the folder with that number.

   d. Folder is put in the main numeric file.

   (NOTE: The file number for a new name is determined by checking the first unused folder and/or the register.)

C. Card file

1. Cards arranged alphabetically

2. Each card contains the name and address of a correspondent or subject and the number of the folder that has been assigned.

3. M -- the symbol used on cards of correspondents and subjects whose records are stored in the miscellaneous alphabetic file.

   (NOTE: The M is replaced by a permanent number if the correspondent or subject is assigned an individual folder in the main numeric file.)

D. Cross-reference

1. Tells where the record is actually kept

2. Is done only in the card index. (In the example shown, someone needing information on Fusy Seal Drug Store would be referred to Walgreen Drugs, Inc, in folder number 319.)

Fuzy Seal Drug Store
Tyler, Texas

SEE: Walgreen Drugs, Inc. 319

IV. Numeric filing procedure

  A. Code

    1. If the card file shows that no number has been assigned to a correspondent or subject, an M is placed in the upper right corner to indicate the record is to be stored in the miscellaneous alphabetic file

    2. A colored pencil may be used for coding

  B. Sort

    1. Records are arranged first by hundreds, then by tens, and finally into correct numeric order

    2. The records coded M are placed in one pile during numeric sorting and are then sorted alphabetically

  C. Store

    1. Records coded M are placed in the correct folder in the miscellaneous alphabetic file

    2. Numerically coded records are filed in the numeric file

       (NOTE: Be careful in reading the coded numbers and the folder numbers to avoid crossing over numbers, such as 2478 for 2748.)

  D. Charge-out and follow-up

    1. Request records

    2. Fill out requisition form

    3. Locate and remove record from the files

    4. Replace the record with an OUT form

    5. Place duplicate copy of requisition in file folder

    6. Place duplicate copy of requisition in tickler file

    7. Check tickler file daily for return of files

8. Follow-up on ON-CALL cards

9. Remove all OUT cards from the files and tickler files when records are returned

10. Cross-out all information recorded on OUT cards indicating that the OUT card is ready to use for another request

11. Store cards, folders, etc. to be used again

V. Other numeric filing methods

- A. Chronologic--filing by date

- B. Terminal-digit

  1. Groups of digits are identified as primary, secondary, and final numbers

Example:	1092-	70	- 435	J. Doe's Social Security number
	Final	Secondary	Primary	

  2. Primary digits show a drawer number

  3. Secondary digits show guide numbers

  4. Final digits show the order or arrangement behind a certain guide

- C. Alpha-numeric

  1. Names of correspondents put in alphabetic sequence may be assigned numbers

  2. Intervals of a hundred numbers should be left open for the numbering of new correspondents' names

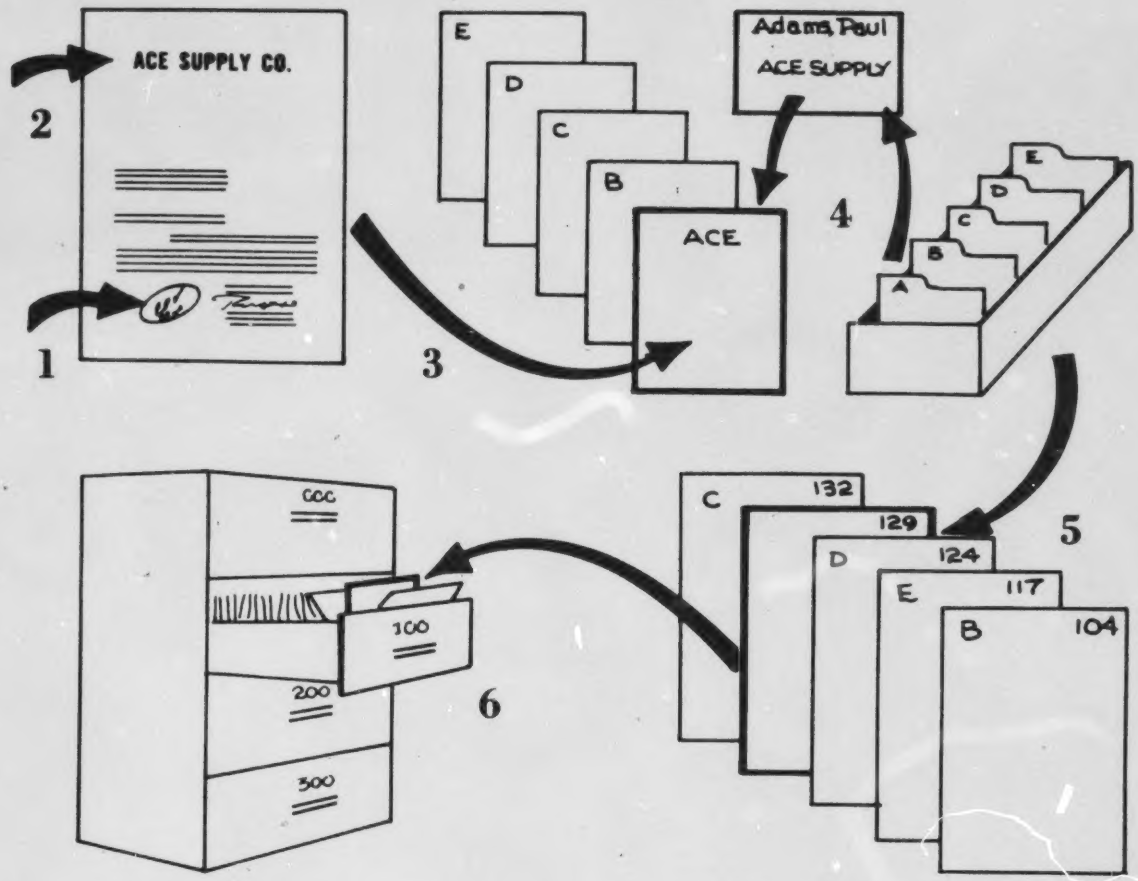
  3. When problems may occur in keeping the absolute alphabetic sequence:

     a. Accept less than strict alphabetic sequence

     b. Re-number all names

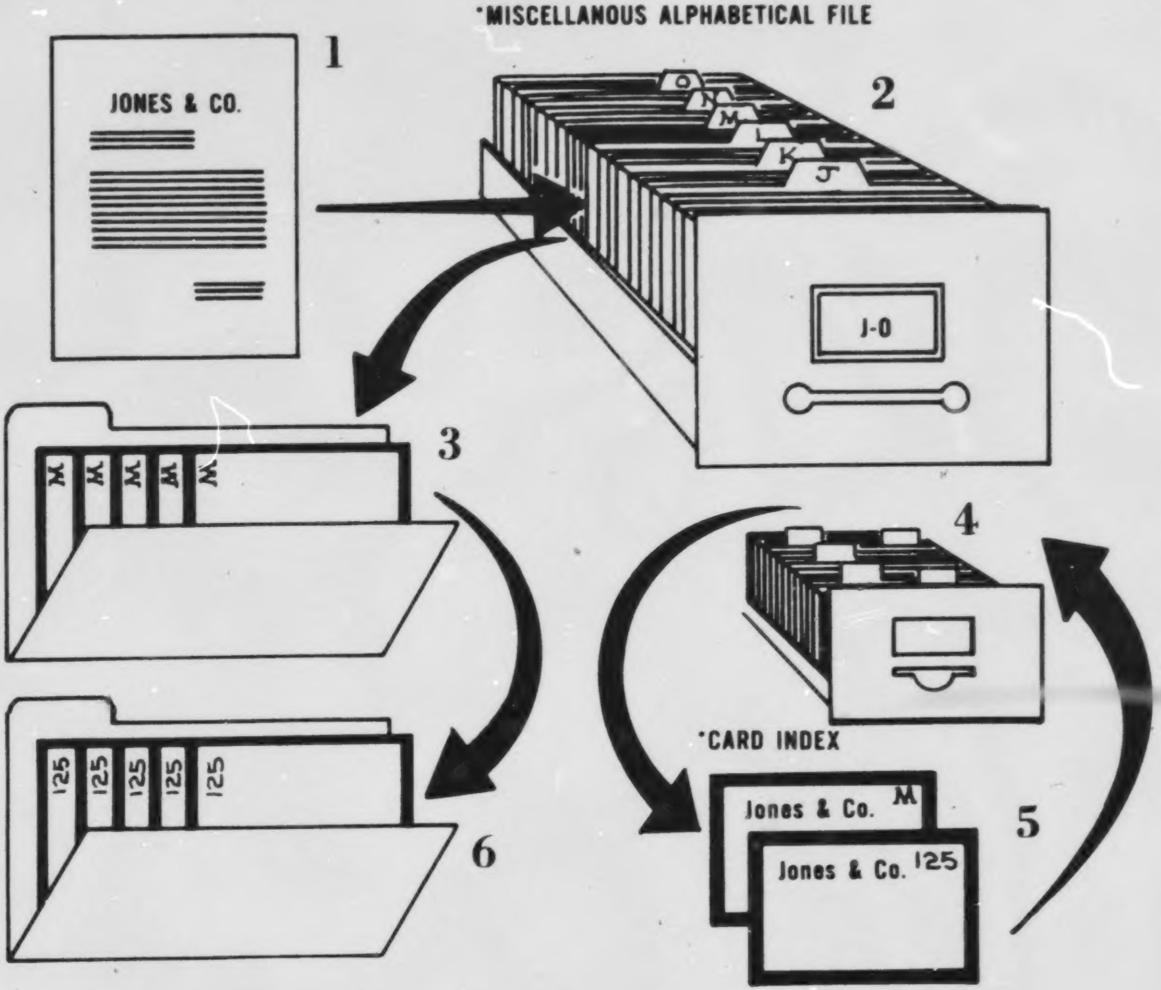
     c. Add another digit at the end of each number

NUMERIC FILING PROCEDURES


ACE SUPPLY CO.
2
1
E
D
C
B
ACE
3
Adams, Paul
ACE SUPPLY
4
E
D
C
B
A
5
C 132
129
D 124
E 117
B 104
ccc
100
200
300
6

TM-1

CODING & STORING CORRESPONDENCE NUMERICALLY

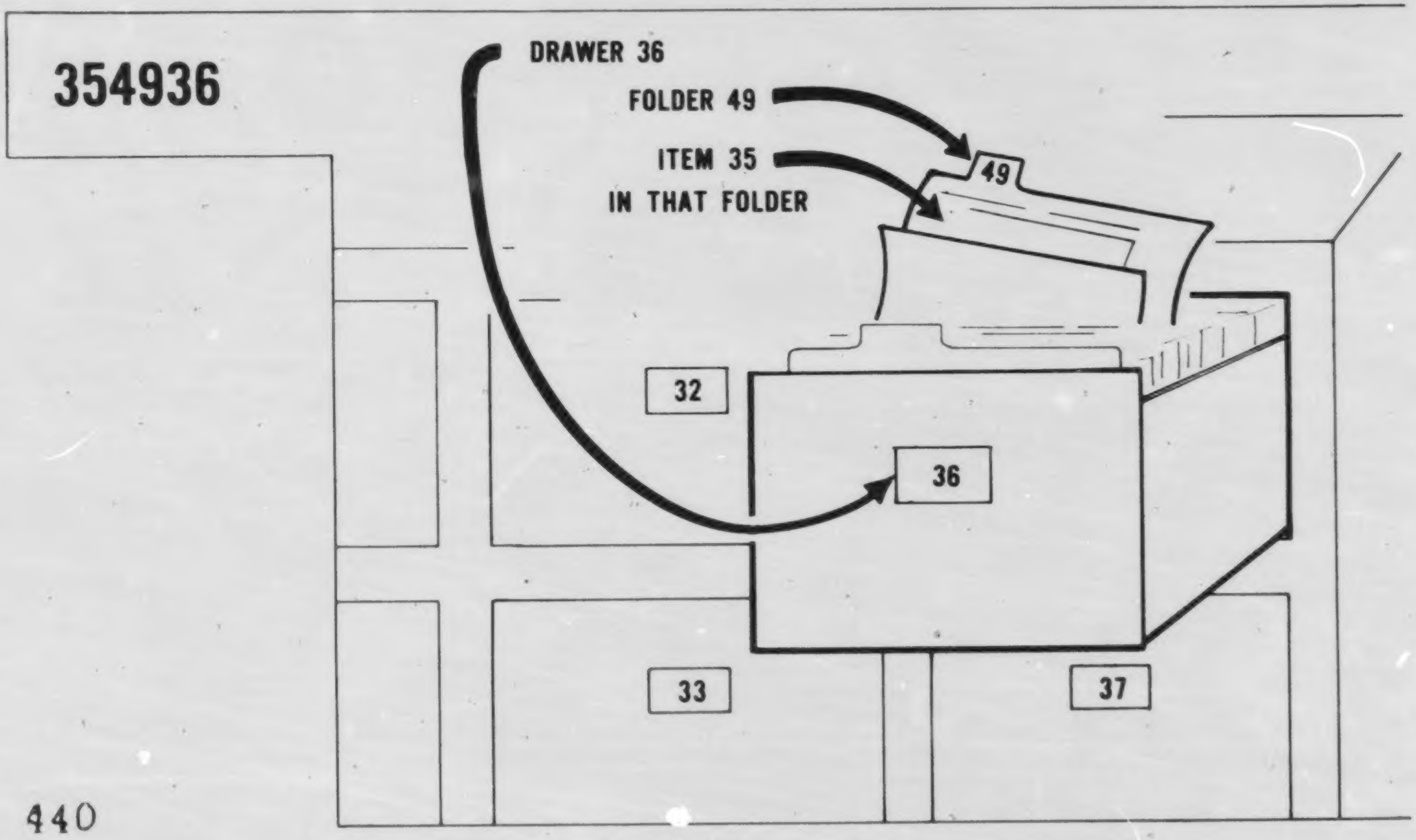

*MISCELLANOUS ALPHABETICAL FILE
1
JONES & CO.
2
O
N
M
L
K
J
J-O
3
M
M
M
M
M
4
*CARD INDEX
Jones & Co. M
Jones & Co. 125
5
6
125
125
125
125
125

An incoming record from a new correspondent (1) is coded M and stored in the miscellaneous alphabetic file. (2) As soon as five records concerning this correspondent accumulate (3) the card index (4) is consulted. The next unassigned number (5) is given to this correspondent and the notation on the card is changed from M to 125 . The records are then recoded 125 and transferred to a numeric folder (6), which is stored in the main numeric file.

ACCESSION BOOK

ACCESSION BOOK		PAGE 45
Number	**Name**	**Date**
2365	Joseph Arnold	June 7, 1977
2366	Gary Miller	June 9, 1977
2367	Donald Wilson	June 10, 1977
2368	Frank Rogers	June 14, 1977

TERMINAL DIGIT FILING



354936

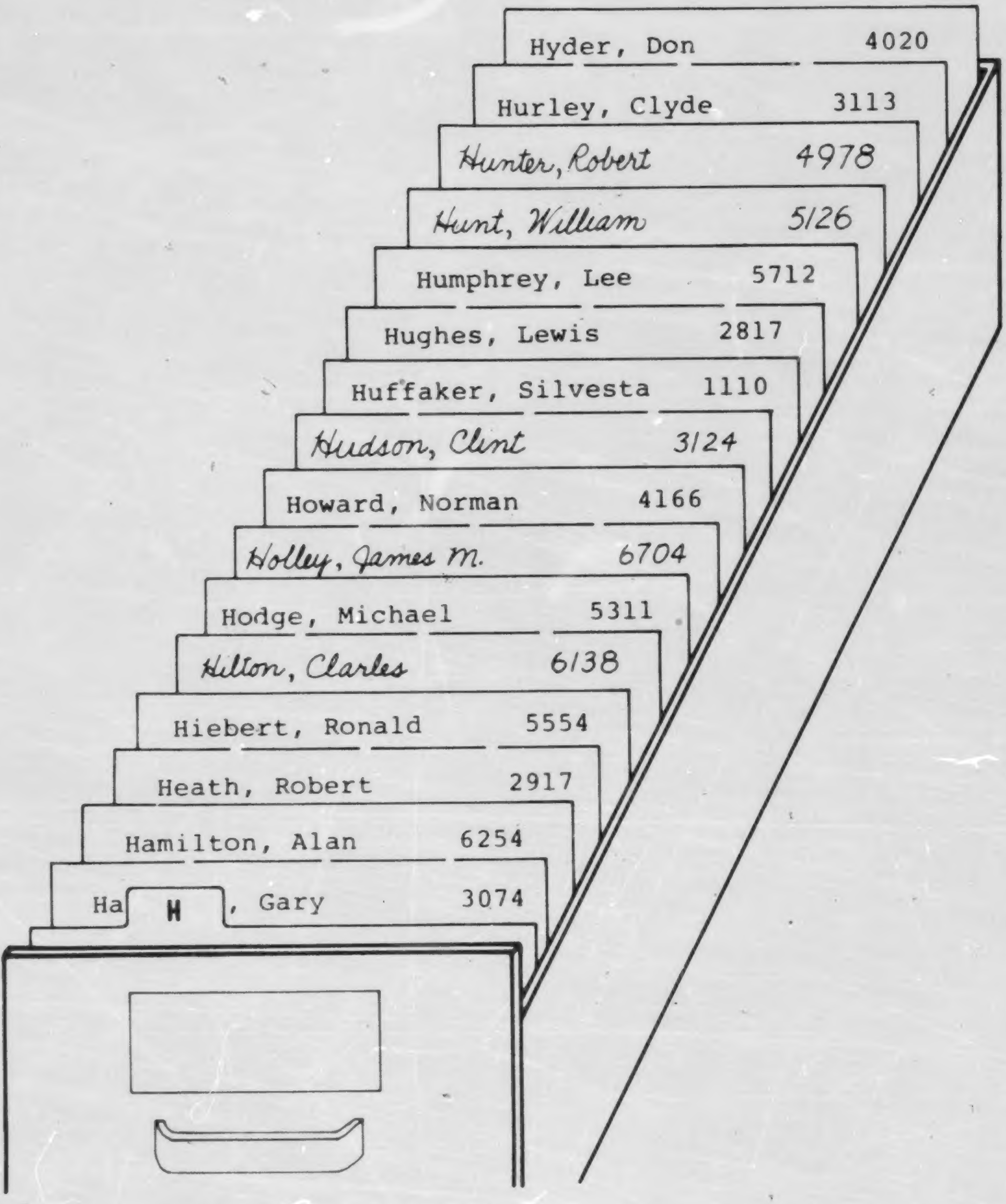
DRAWER 36

FOLDER 49

ITEM 35
IN THAT FOLDER

49
32
36
33
37

INDEX CARD CONTROL FILE


Hyder, Don 4020
Hurley, Clyde 3113
Hunter, Robert 4978
Hunt, William 5126
Humphrey, Lee 5712
Hughes, Lewis 2817
Huffaker, Silvesta 1110
Hudson, Clint 3124
Howard, Norman 4166
Holley, James M. 6704
Hodge, Michael 5311
Hilton, Clarles 6138
Hiebert, Ronald 5554
Heath, Robert 2917
Hamilton, Alan 6254
Ha
H
, Gary 3074

UNIT XV

FILING MATERIALS NUMERICALLY

ASSIGNMENT SHEET #1--PLACING MATERIALS IN NUMERIC ORDER

Directions: Complete the following exercises.

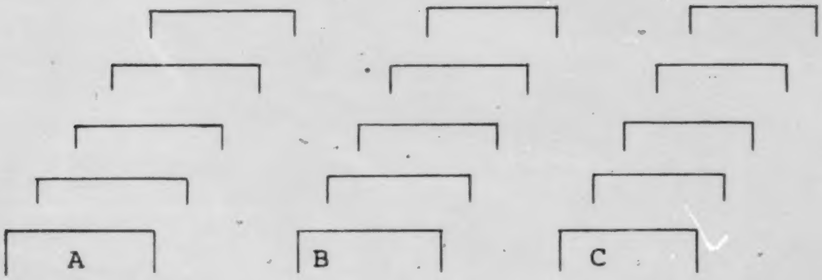
A. Put the following numbers in correct numeric order.

85, 79, 83, 80, 77, 81, 89, 57, 84, 65, 87, 86, 90, 92

B. Below are a group of numbers. Put the numbers numerically in the proper alphabetic group.

B-27 A-84 B-19 C-59 B-99 A-68 C-96 C-57

A-20 B-05 A-30 C-74



C. Below are a group of numbers. Put the numbers in their proper numeric order.

1-41024
3-72116
5-82164
1-64287

3-66716
3-71116
5-84641
1-48024

1-40014
3-72216
5-84461
5-84614

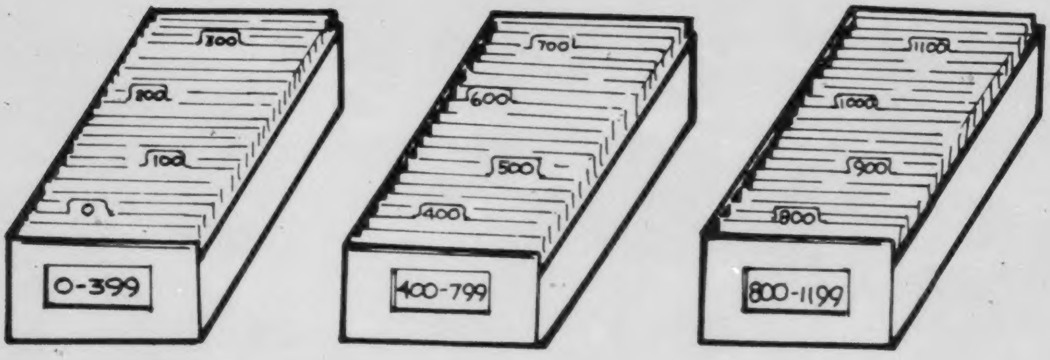
UNIT XV

FILING MATERIALS NUMERICALLY

ASSIGNMENT SHEET #2--USING NUMERIC CARD FILE SYSTEM

Directions: Using the numbers listed below indicate in which file drawer and file guide you would place the numbers.

NUMBERS	FILE IN DRAWER LABELED	FILE BEHIND GUIDE
463		
1,130		
28		
663		
540		
301		
802		
186		
799		
198		


300
200
100
0
0-399
700
600
500
400
400-799
1100
1000
900
800
800-1199

UNIT XV

FILING MATERIALS NUMERICALLY

ASSIGNMENT SHEET #3--LOGGING AN ACCESSION RECORD BOOK

Directions: Listed below are the names and dates of correspondence that has been received. Using the accession records book, write in the names and dates of the correspondence. Also include the new numbers assigned to each piece of correspondence. Remember that the date of the correspondence determines what order the information is put in the accession record book.

NAME	DATE
John Jones	April 7, 1978
Harry Smith	March 17, 1978
Tom Weaver	March 15, 1978
Sid Croft	April 9, 1978
Mary Thompson	March 22, 1978
Jim Crampton	April 13, 1978

ACCESSION BOOK page 19

NUMBER	NAME	DATE
756	Harold Murphy	March 14, 1978

UNIT XV

FILING MATERIALS NUMERICALLY

ASSIGNMENT SHEET #4--USING TERMINAL NUMBERS IN FILING

Directions: Arrange the following numbers in terminal digit filing order.

273165 ____________________

221847 ____________________

823416 ____________________

274647 ____________________

229922 ____________________

118119 ____________________

373165 ____________________

164352 ____________________

283886 ____________________

274030 ____________________

294130 ____________________

643718 ____________________

UNIT XV

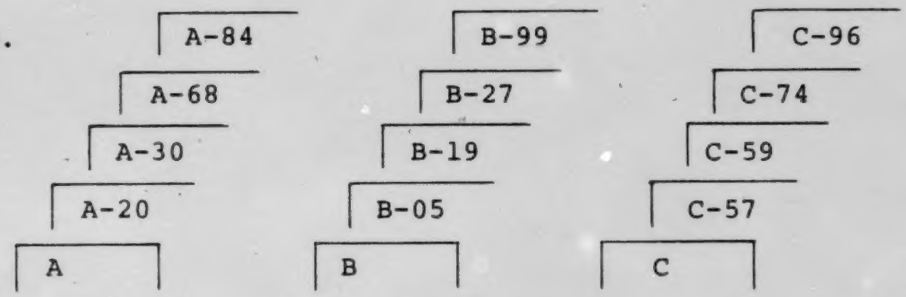
FILING MATERIALS NUMERICALLY

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

A. 57, 65, 77, 79, 80, 81, 83, 84, 85, 86, 87, 89, 90, 92

B.



C.
1-40014
1-41024
1-48024
1-64287

3-66716
3-71116
3-72116
3-72216

5-82164
5-84461
5-84614
5-84641

Assignment Sheet #2

NUMBERS	FILE IN DRAWER LABELED	FILE BEHIND GUIDE
463	400-799	400
1,130	800-1199	1,100
28	0-399	0
663	400-799	600
540	400-799	500
301	0-399	300
802	800-1199	800
186	0-399	100
799	400-799	700
198	0-399	100

Assignment Sheet #3

ACCESSION BOOK		page 19
NUMBER	NAME	DATE
756	Harold Murphy	March 14, 1978
757	Tom Weaver	March 15, 1978
758	Harry Smith	March 17, 1978
759	Mary Thompson	March 22, 1978
760	John Jones	April 7, 1978
761	Sid Croft	April 9, 1978
762	Jim Crampton	April 13, 1978

Assignment Sheet #4

823416

643718

118119

229922

274030

294130

221847

274647

164352

273165

373165

283886

UNIT XV

FILING MATERIALS NUMERICALLY

UNIT TEST

1. Match terms on the right to the correct definition

____a. Contains a record of the numbers already given to correspondents and subjects

____b. Is one in which numbers are read in groups from right to left rather than left to right

____c. One which contains alphabetically filed papers of correspondents who have not been assigned numbers because the volume of correspondence with them is not yet large enough

____d. One which contains the names of correspondents and any subjects alphabetically arranged

____e. One which contains guides and folders with captions made up of numbers

____f. One by numbers instead of names

____g. One in which a number is assigned to each correspondent or subject that warrants an individual folder

1. Numeric file
2. Register
3. Card file
4. Numeric filing
5. Alphabetic Miscellaneous file
6. Terminal-digit file
7. Consecutive-number file

2. Discuss the advantages and disadvantages of numeric filing by:

   a. Identifying advantages in the following statements

   ____(1) Expansion is easy

   ____(2) There is greater ease in filing a wide variety of material

   ____(3) Misfiled folders are never caught

   ____(4) Information is kept private

   ____(5) Labeling saves time

   b. Identifying disadvantages in the following statements

   ____(1) It is not a direct method of filing

   ____(2) Crossing numbers may happen

   ____(3) Less equipment is necessary

   ____(4) Two kinds of filings are used

3. Place a "√" beside those statements that are true concerning features of a numeric file

____a. In a main numeric file, a number is assigned consecutively to each correspondent or subject that has an individual folder.

____b. After a number is assigned to a main numeric file, it is changed yearly.

____c. There are three methods of arranging guides and folders.

____d. Correspondents or subjects with less than ten and more than five papers are filed alphabetically in the miscellaneous file.

____e. A miscellaneous alphabetic file is located in the front part of the first filing drawer of the main numeric file.

____f. When a miscellaneous alphabetic file is transferred to a main numeric file, the first unused number is assigned to that correspondent or subject.

____g. The card file of a main file is arranged numerically.

____h. The letter misused on cards of correspondents whose records are stored in the miscellaneous alphabetic file.

____i. Cross-referencing in a main numeric file is done only in the card index.

4. List the steps in the numeric filing procedure according to the following guide:

   a. Code

   b. Sort

   c. Store

   d. Charge-out and follow-up

5. List other numeric filing systems

   a.

   b.

   c.

6. Demonstrate the ability to:

   a. Place materials in numeric order

   b. Use a numeric card file system

   c. Log an accession book

d. File, using terminal numbers

(NOTE: If the skills have not been accomplished prior to the test, ask the instructor when they should be completed.)

UNIT XV

FILING MATERIALS NUMERICALLY

ANSWERS TO UNIT TEST

1. __2__ a.

   __6__ b.

   __5__ c.

   __3__ d.

   __1__ e.

   __4__ f.

   __7__ g.

2. a. Advantages

   __✓__ (1)

   __✓__ (2)

   _____ (3)

   __✓__ (4)

   __✓__ (5)

   b. Disadvantages

   __✓__ (1)

   __✓__ (2)

   _____ (3)

   __✓__ (4)

3. __✓__ a.

   _____ b.

   __✓__ c.

   _____ d.

   __✓__ e.

   __✓__ f.

   _____ g.

   __✓__ h.

   __✓__ i.

4. Coding -- M if it is a new correspondent. The number the card file shows for that correspondent should be

written on new papers from established correspondents.

Sorting -- M coded records are filed alphabetically. Records are arranged by hundreds, tens, and then in numerical order.

Storing -- M coded records are filed in the miscellaneous alphabetic file. Numerically coded records are filed in the numeric file.

Charge-out and follow-up -- The records are requested and a requisition form is filled out. The records are located and removed from the file. An OUT form is placed where the records were taken. Duplicate copies of requisition are placed in file folder and tickler file. The tickler file is checked daily and a follow-up is made on ON-CALL cards. All OUT cards are removed from the files when the records are returned, and the information on OUT cards is crossed-out. The cards, folders, etc. are stored to be used again.

5. a. Chronologic

   b. Terminal-digit

   c. Alpha-numeric

6. Evaluated to the satisfaction of the instructor

UNIT XVI

HANDLING INCOMING MAIL

UNIT OBJECTIVE

After completing this unit of instruction, the student should be able to define mailing terms, explain procedures for handling incoming mail, and demonstrate the ability to sort, route, and classify incoming mail. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student should be able to:

1. Define terms associated with handling incoming mail
2. Identify procedures for sorting and routing incoming mail
3. Sequence the steps involved in opening incoming mail
4. Identify procedures concerning removing contents from the envelope
5. Write eight situations in which an envelope should be attached to the correspondence
6. State procedures used in dating mail
7. List five types of mail that are registered and state four reasons for keeping mail registers
8. State two views on screening mail
9. Distinguish procedures concerning reading, underlining, and placing notes on mail
10. List mail items to be placed on an employer's desk in their order of importance
11. Identify procedures on handling interoffice mail
12. Demonstrate the ability to record, route, classify, and sort incoming mail

UNIT XVI

HANDLING INCOMING MAIL

SUGGESTED ACTIVITIES

I. Instructor:

   A. Provide objective sheet

   B. Discuss objective sheet

   C. Provide information sheet

   D. Discuss information sheet

   E. Make and discuss transparency

   F. Demonstrate and discuss procedures outlined on job sheet

   G. Provide forms, guides, and job sheet

   H. After securing permission, allow student to sort office mail at the school. Rotate students on a weekly basis.

   I. Conduct field trip to local post office

   J. Give test and evaluate results

II. Student:

   A. Read objective sheet

   B. Study information sheet

   C. Discuss information sheet

   D. View and discuss transparency

   E. Read and complete job sheet

   F. Take test

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

B. Information sheet

C. Transparency master

  1. XVI-TM-1--Routing Slip

D. Job sheet

  1. Job Sheet #1--Recording, Routing, Classifying, and Sorting Incoming Mail

E. Answers to job sheet

F. Unit test

G. Answers to unit test

II. References:

A. Archer, Fred C., Raymond F. Brecker, and Jeffrey R. Stewart. General Office Procedures. 4th ed. New York, New York: Gregg Division, McGraw-Hill Book Company, 1975.

B. Gregg, John Robert and others. Applied Secretarial Practice. 6th ed. New York, New York: Gregg Division, McGraw-Hill Book Company, 1968.

C. Hanna, J. Marshall, Estelle L. Popham, and Rita Sloan Tilton. Secretarial Procedures and Aministration. 6th ed. Cincinnati, Ohio: South-Western Publishing Company, 1973.

D. Meehan, James R., William R. Pasework, and Mary Ellen Oliverio. Clerical Office Procedures. 5th ed. Cincinnati, Ohio: South-Western Publishing Company, 1973.

E. _______________. Secretarial Office Procedures. 8th ed. Cincinnati, Ohio: South-Western Publishing Company, 1972.

F. Woodward, Theodore, John A. Pendery, and Howard L. Newhouse. Secretarial Office Procedures. Cincinnati, Ohio: South-Western Publishing Company, 1972.

UNIT XVI

HANDLING INCOMING MAIL

INFORMATION SHEET - SECTION I

I. Terms and definitions

   A. Processing incoming mail--Sorting, routing, opening, removing contents, attaching envelope, dating registering, screening, and annotating incoming mail

   B. Postal Services--Includes classification of mail, special mailing services, official mail, and postal information

   C. Automatic envlope openers--Machines which cut a thin piece off the edge of the envelope as it is fed into the machine by the operator

   D. OCR (Optical Character Reader)--Machine which electronically sorts letters and postal cards faster than manual sorting

   E. Time stamp--Device which prints the year, month, date, hour, and minute letters, telegrams, and other documents are received

II. Sorting and routing incoming mail

   A. In a small office, one person may sort and deliver mail to the individual departments

   B. In a large company, mail is sorted and placed in bins or trays; then it is delivered by a mail clerk or messenger.

   C. Telegrams, mailgrams, special delivery, registered, insured, and certified mail are handled promptly upon receipt

   D. The remainder of the mail should be sorted as follows:

      1. First class mail

      2. Interoffice mail

      3. Bulk mail, such as newspapers, periodicals, books, catalogs, circulars, and merchandise

E. Mail marked "personal" should be separated and delivered to persons addressed

III. Opening mail (except personal and confidential)

A. Open telegrams, registred mail, and special delivery items first. If there are only a few, they may be opened with a hand letter opener. If there are many, they may be opened by machine, as described below.

B. Sort envelopes according to size, keeping the same size envelopes together

C. Take a handful of envelopes approximately the same size and tap them on a desk or table

D. Turn the envelopes upside down lightly to get top edges even

E. Open the letters by running them through the letter opening machine

IV. Removing the contents of the envelope

A. Work space should be cleared for storing and stacking the mail after opening. Supplies such as pens, paper clips, rubber stamps, time stamp, stapler, colored pencil, tape, and routing forms should be handy.

B. Contents of each envelope should be removed as follows:

1. Place the envelopes to be opened in front of you with the backs of the envelopes up and the opened edges to the right if right-handed

2. Remove the contents, place the empty envelope on your left, unfold the letter and fasten any enclosures to it

3. Attach any small enclosures to the front of the letter. Enclosures larger than the letter are attached to the back. If any enclosures mentioned in the letter are missing, write No beside the enclosure notation on the margin of the letter.

4. Be sure the name and return address of the sender are given in the letter before throwing the envelope away or going ahead to the next one. If not given, the envelope should

be stapled or clipped to the back of the letter.

5. Fix the letter or other contents of the envelope with tape if it has been cut while being opened

6. If mail is opened by mistake, the envelope should be resealed with tape and marked Opened by Mistake with your initials

V. Attaching the envelope

A. Attach the envelope to the back of the letter when:

1. An envelope is incorrectly addressed

2. A letter was incorrectly sent by the post office and had to be forwarded

3. A letter does not have a return address

4. The return address in the letter differs from that on the envelope

5. The date of the letter is much different than the date on the envelope

6. A signature is not in the letter

7. An enclosure mentioned was not put in the envelope

8. A letter contains a bid, an offer, or acceptance of a contract. This may be needed as legal evidence.

VI. Dating the mail

A. Incoming mail should be marked with the date and time received using one of the following:

1. Pen

2. Pencil

3. Rubber stamp

4. Time stamp machine

VII. Registering the mail

A. It is often important to keep a mail register of important mail to record the following:

1. Incoming mail, such as registered, certified, special delivery, or insured
2. Expected (separate-cover) mail
3. Mail sent around to other employees
4. Telegrams and cables
5. Mail containing cash or checks

B. It is important to know the date each piece of mail is received for the following reasons:

1. To prove date of receipt
2. To help answer mail right away
3. To show letter arrived too late for any action to be taken on the matter
4. In case the letter may have been undated, to provide the only clue to its mailing date by the date of receipt

VIII. Attitudes toward screening the mail

A. Some bosses want to see all incoming mail

B. Some bosses want their secretaries to screen the mail so that those items which should be handled by others are put aside

IX. Reading, underlining, and placing notes on the mail

A. Each letter should be read through once and checked for important facts. Calendar notations should be made.

B. Words and phrases should be underlined to show the main portion of the letter

C. Necessary or helpful notes should be written in the margin. These notes come under two headings:

1. Suggested action of routine letters, such as "File," "Ack." (for acknowledge), etc.

2. Special notes, such as "See our last letter" attached (which will have been removed from the files and attached to the letter received)

(NOTE: Since original letters are sometimes copied on machines and sent outside the organization, an executive may request that no writing be done on the face of the letter, and all notes be written on the back.)

X. Arranging mail for employer

Mail should be placed on employer's desk in order of the following importance:

A. Telegrams

B. Special delivery letters

C. Regular mail

D. Ads

E. Magazines and newspapers

XI. Handling interoffice mail

Many businesses have a large volume of internal mail that passes among the various departments, offices, and branches. Procedures, which include the following, have been made to handle interoffice mail.

A. Interoffice messages are prepared on special stationery known as Interoffice Memorandum

B. Interoffice memorandums may be sent without envelopes if they contain no confidential information or are sent to another office in the same area.

C. When envelopes are used, reusable ones can be used

D. If several pieces of interoffice mail are addressed to the same person at a distant branch, all the pieces can be sent in a single envelope

E. Interoffice items not enclosed in envelopes are date-stamped and sent at once, according to the instructions on the heading

ROUTING SLIP

ROUTING SLIP

FROM: ______________________ **DATE:** ______________________

TO:
1. ______________________ 4. ______________________
2. ______________________ 5. ______________________
3. ______________________ 6. ______________________

FOR:

☐ Approval

☐ File

☐ Necessary Action

☐ Note and Return

☐ Recommendation

☐ See Me

☐ Signature

☐ Comment

☐ Information

____

UNIT XVI

HANDLING INCOMING MAIL

JOB SHEET #1--RECORDING, ROUTING, CLASSIFYING, AND SORTING INCOMING MAIL

I. Tools and equipment needed:

A. Pencil or pen

B. Mail register form

C. Routing slips

II. Procedures

A. You work in a large office as a mail clerk. At 9 a.m. you receive the following mail. Record each item in the correct journal, complete slips for routing, and make notations and classifications in the "Comments" column.

	COMMENTS
1. Letter Dr. Smith received yesterday that he wants routed to Mary Taylor and Jack Wilson in Purchasing Department 2. Confidential letter to Janice Purdy, Sales Representative 3. Book for Research Librarian 4. Printed price list from Station Paper Company of St. Louis, Mo. 5. Interoffice memos to three vice-presidents	

	COMMENTS
6. Insured package #2626263 to Purchasing Department from Agnes Halt, Dallas, Texas 7. Out-of-town newspaper for Rachel Jones, clerk 8. Insured letter to Personnel Department 9. Business Week Magazine to Anna Harp, secretary 10. Pamphlet from Grayson Office Supply Co. 11. Registered letter #636579 to R. J. Johnson, president	

B. Sort the above mail by placing the number of each item in the correct slot

President	V. President	Purchasing	Sales	Library	Personnel	Office Employee

UNIT XVI

HANDLING INCOMING MAIL

ANSWERS TO JOB SHEET #1

A. Comments

1. Interoffice-routing slip
2. First-class, private
3. Parcel post
4. Third-class
5. Place in individual envelopes and deliver
6. Parcel post
7. Second-class
8. Insured
9. Second-class
10. Third-class
11. Registered, first-class

B.

President	V. President	Purchasing	Sales	Library	Personnel	Office Employee
11	5	1 4 6 10	2	3	8	7 9

UNIT XVI

HANDLING INCOMING MAIL

UNIT TEST

1. Define the following terms:

   a. Processing incoming mail

   b. Postal Services

   c. Automatic envelope openers

   d. OCR

   e. Time stamp

2. Place a "✓" beside those statements that are true concerning sorting and routing incoming mail

   ____a. In a small office, mail is usually sorted by one individual

   ____b. Sorting bins and trays are used for mail in large offices

   ____c. Registered mail is handled last, since it requires special attention

   ____d. First class mail and bulk mail are sorted separately

   ____e. Personal mail is placed with regular first-class mail

3. List the steps in opening mail by placing the numbers 1 through 5 in the proper order in the blanks

   ____a. Envelopes are tapped on the desk

   ____b. Run letters through the letter opening machine ____c. Open telegrams, registered items, and special delivery mail

____d. Sort envelopes according to size

____e. Turn envelopes upside down

4. Place a "✓" beside those statements that are true concerning removing the contents from an envelope

____a. Work space does not have to be organized, but a place should be provided for stacking mail

____b. The only equipment needed for opening mail is a sharp pair of scissors

____c. When removing papers from envelopes, place the envelopes with the backs up and the opened edges to the right side

____d. Remove the contents from the envelope, place the empty envelope to left, unfold the letter, and fasten any enclosures

____e. Attach small enclosures to the front and large enclosures to the back of correspondence

____f. If no enclosures are included but are mentioned in the correspondence, a No should be written in the margin of the letter

____g. As soon as contents are removed, throw the envelope away

____h. If mail is opened by mistake, the envelope flap should be glued so no one will know it has been opened

5. Identify eight situations in which an envelope should be attached to the correspondence

a.

b.

c.

d.

e.

f.

g.

h.

6. State the procedure used in dating the mail

7. List five types of mail that are registered and give four reasons why registers should be kept

   a. (1)

      (2)

      (3)

      (4)

      (5)

   b. (1)

      (2)

      (3)

      (4)

8. State the two views on screening mail

   a.

   b.

9. Place a "√" beside those statements that are true concerning reading, underlining, and placing notes on mail

   ____a. Each letter should be read through at least twice

   ____b. Words and phrases in the letter should be circled in red ink

   ____c. Helpful notes should be written in the margin ____d. Avoid putting notes on mail that will be copied for others

10. Sequence the following mail items to be presented to an employer in order of importance from "1" to "5", with "1" being most important

____magazines and newspapers

____telegrams

____regular correspondence

____advertising literature

____special delivery mail

11. Place a "√" beside those statements that are true concerning handling interoffice mail

____a. Interoffice memorandums must always be sent in envelopes

____b. Informal and reusable envelopes are used for interoffice mail

____c. Interoffice messages are prepared on international office forms

____d. If several pieces of interoffice mail are addressed to the same person at a distant branch, all items must be sent in separate envelopes

12. Demonstrate the ability to record, route, classify, and sort incoming mail

(NOTE: If this procedure has not been complete prior to test, ask the instructor when it should be completed.)

UNIT XVI

HANDLING INCOMING MAIL

ANSWERS TO UNIT TEST

1. a. Processing incoming mail--The act of sorting, routing, opening, removing contents, attaching evelope, dating, registering, screening, and annotating incoming mail

   b. Postal Services--Includes classification of mail, special mailing services, official mail, and postal information

   c. Automatic envelop openers--Machines which cut a thin piece off the edge of the envelope as they are fed into the machine by the operator

   d. OCR--Machine which can electronically sort letters and postal cards faster than manual sorting

   e. Time stamp--Device which prints the year, month, date, hour, and minute of receipt of letters, telegrams, and other documents

2. _✓_ a.
   _✓_ b.
   ___ c.
   _✓_ d.
   ___ e.

3. _3_ a.
   _5_ b.
   _1_ c.
   _2_ d.
   _4_ e.

4. ___ a.
   ___ b.
   _✓_ c.

✓ d.

✓ e.

✓ f.

____ g.

____ h.

5. a. An envelope is incorrectly addressed

   b. A letter was incorrectly sent by the post office and had to be forwarded

   c. A letter does not contain a return address

   d. The return address in the letter differs from that on the envelope

   e The date of the letter is much different than the date on the envelope

   f. A signature does not appear in the letter

   g. An enclosure which was not included in the envelope

   h. A letter contains a bid, an offer, or acceptance of a contract

6. Mark incoming mail with the date and time received using a pen, pencil, rubber stamp, or time stamp machine

7. a. (1) Incoming mail

      (2) Expected mail

      (3) Mail circulated to various assocaites

      (4) Telegrams and cables

      (5) Mail containing cash or checks

   b. (1) Shows date of receipt

      (2) Helps secretary in answering mail promptly

      (3) A letter may arrive too late for any action to be taken on the matter

      (4) The letter may be undated, so the only clue to its date is the date of receipt

8. a Some bosses want to see all of the mail

   b. Other bosses want their secretaries to screen mail, so that those items to be handled by subordinates are separated

9. ____a.

   ____b.

   _✓_c.

   _✓_d.

10. _5_

    _1_

    _3_

    _4_

    _2_

11. ____a.

    _✓_b.

    ____c.

    ____d.

12. Evaluated to the satisfaction of the instructor

UNIT XVII

HANDLING OUTGOING MAIL

UNIT OBJECTIVE

After completing this unit of instruction, the student should be able to define mailing procedures and equipment, explain procedures for handling outgoing mail, and demonstrate the ability to prepare letters and packages for mailing. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student should be able to:

1. Define terms associated with mailing procedures and equipment
2. Identify procedures in typing envelopes, cards, and mailing labels
3. Discuss the different procedures used to fold letters in large and small envelopes
4. List the steps involved in placing stamps on envelopes
5. Write the advantages of using postage meters
6. Explain the procedures in sealing envelopes
7. Identify procedures used to check outgoing mail
8. List the four categories used in presorting mail
9. Write seven suggestions to help cut mailing costs
10. Identify seven ways to speed the handling of mail
11. Discuss in writing the different types of mailing lists
12. Match terms used in classifying mail with their correct definitions
13. Select correct features of special mailing services
14. Describe the mailgram process

15. Identify the different methods in obtaining proof of mailing and delivery
16. Describe the procedures used to locate lost mail
17. Explain the method of forwarding mail
18. Demonstrate the ability to:
    a. Select and use packaging materials
    b. Prepare packages for mailing
    c. Use ZIP Codes
    d. Type envelopes for mailing
    e. Hold and insert letters in envelopes

UNIT XVII

HANDLING OUTGOING MAIL

SUGGESTED ACTIVITIES

I. Instructor:

  A. Provide objective sheet

  B. Discuss objective sheet

  C. Provide information sheet

  D. Discuss information sheet

  E. Make, show, and discuss transparencies

  F. Pass out assignment sheets and job sheets

  G. Demonstrate and discuss procedures outlined on assignment sheets and job sheets

  H. Discuss other mailing services in addition to the U.S. Postal Service

  I. Secure local ZIP code directories for student practice in using ZIP codes

  J. Conduct field trip to any large company in the area to visit their mailroom

  K. Ask permission for students to do mailing for a school or civic group, such as the Parents-Teachers Association (PTA)

  L. Give unit test and evaluate results

II. Student:

  A. Read objective sheet

  B. Study and discuss information sheet

  C. View transparencies

  D. Read assignment sheets

  E. Complete assignment sheets

  F. Read job sheets

G. Complete job sheets

H. Take test

INSTRUCTIONAL MATERIALS

I. Included in this unit:

A. Objective sheet

B. Information sheet

C. Transparency masters

1. XII-TM-1--Routing Slip
2. XII-TM-2--Typing Envelopes
3. XII-TM-3--Packing Items
4. XII-TM-4--Wrapping Items
5. XII-TM-5--State Abbreviations

D. Assignment sheets

1. Assignment Sheet #1--Materials Used in Packing
2. Assignment Sheet #2--Preparing Packages for Mailing
3. Assignment Sheet #3--Using ZIP Codes

E. Job sheets

1. Job Sheet #1--Typing Envelops Using State Abbreviations and ZIP Codes
2. Job Sheet #2--Folding and Inserting Letters

G. Answers to job sheets

H. Unit test

I. Answers to unit test

II. References:

A. Archer, Fred C., Raymond F. Brecker, and Jeffrey R. Stewart. General Office Procedures. 4th ed. New York, New York: Gregg Division, McGraw-Hill Book Company, 1975.

B. Gregg, John Robert and others. Applied Secretarial Practice. 6th ed. New York, New York: Gregg Division, McGraw-Hill Book Company, 1968.

C. Hanna, J. Marshall, Estelle L. Popham, and Rita Sloan Tilton. Secretarial Procedures and Administration. 6th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

D. Meehan, James R., William R. Pasewark, and Mary Ellen Oliverio. Clerical Office Procedures. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

E. Meehan, James R., Mary Ellen Oliverio, and William L. Newhouse. Secretarial Office Procedures. Cincinnati, Ohio: South-Western Publishing Co., 1972.

F. Woodward, Theodore, John A. Pendery, and Howard L. Newhouse. Secretarial Office Procedures. Cincinnati, Ohio: South-Western Publishing, Co., 1972.

UNIT XVII

HANDLING OUTGOING MAIL

INFORMATION SHEET

I. Terms and definitions

A. Preparing outgoing mail--Addressing envelopes, folding and inserting letters, putting on stamps or using postage meter, sealing envelopes, checking, and presorting mail for mailing

B. Mail inserting machine--Machine which will automatically stuff a large number of envelopes in a short time

C. Folding machine--Machine which can automatically fold up to 18,000 sheets and hour

D. Postage meter or automatic mailing machine--Machine which can print postage and postmark, and then seal an envelope in one operation

E. Addressing machine--High speed machine which addresses cards or envelopes using either stencil address plates (i.e., Elliot addressing machine) or permanent metal plates (i.e., Addressographs)

F. Postage scale--Object used to weigh letters to determine correct postage. Larger models weigh packages and boxes

G. Optical Character Reader (OCR)--Machine which electronically sorts letters and postage cards faster than they can be sorted by hand

II. Typing envelopes, cards, and mailing labels

A. Mailing address must be typed slightly below the horizontal center of the envelope or card

1. The address is typed single space

2. Each line is typed with the same left hand margin (also called "blocked")

B. The city, state, and ZIP code must be typed on the bottom line of the mailing address

1. Two-letter state abbreviations must be used
2. Allow only one space between the state and the ZIP code

C. The street address or post office box number is typed on the next to the last line. An apartment number or room number, if used, should follow the street address, separated by a comma.

D. The following are correctly typed mailing addresses:

Dr. John Jones
1673 Hamilton Avenue, Suite 333
Big Spring, TX 79720

Ms. Mary Smith
Advertising Department
Sterling Products
2121 West Avenue J
New York, NY 10012

E. The return address should be in the upper left corner

F. Any special directions, such as Personal or Confidential, should be typed four lines below the return address. Each main word should begin with a capital letter, and all words should be underscored.

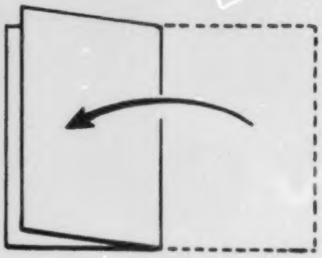
G. Postal directions, such as SPECIAL DELIVERY or REGISTERED, should be typed in all capital letters in the upper right hand corner of the envelope--below the stamp.

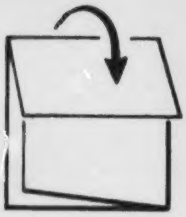
III. Folding and inserting letters

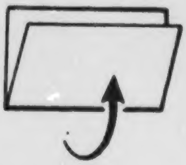
A. The correct way to fold and insert letters in small, large, or window envelopes is shown on the next page

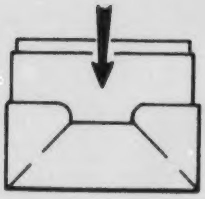
B. All folds should be straight and free from smudges

SMALL ENVELOPES

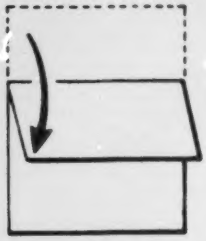

1

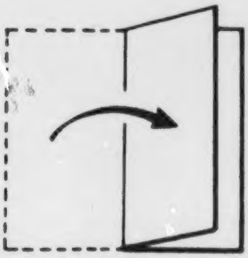

2


3


4

LARGE ENVELOPES


1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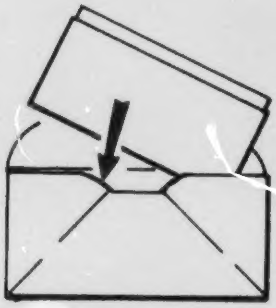
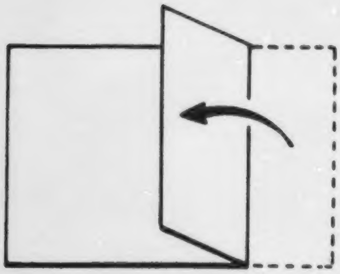

3

WINDOW ENVELOPES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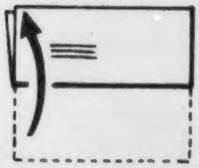
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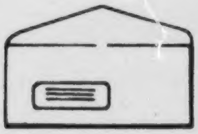

3

IV. Placing stamps

A. A hand-stamp machine may be used for quickly placing stamps on envelopes. The machine moistens and puts on a stamp each time the plunger is depressed.

B. If a hand stamp machine is not available, stamps may be attached as follows:

1. Stack envelopes face up
2. Using a strip of stamps, pass each stamp over a stamp moistener
3. Stamp the top envelope and remove the strip
4. Set the envelope aside and continue in the same manner

V. Using postage meters

A. Postage meters print postage, postmarks and seal envelope in one operation

B. The machine prints postage on a gummed tape for mailing packages

C. Advantages include the following:

1. Saves time
2. Prevents stamps coming off of envelopes
3. Speeds mail, since metered mail is not cancelled at the post office
4. Company has control of stamp supply, none is lost or used on personal mail

VI. Sealing the mail

A. If several envelopes are to be sealed by hand, overlap the envelopes exposing the gummed flaps

B. A moistener is run over the flaps, and the envelopes are closed and sealed

VII. Checking the outgoing mail

A. Before outgoing mail is sent, check to see if the following have been done:

1. Letter is signed
2. Address is typed correctly on both the letter and envelope
3. If Attention of ________ is used, it is typed on the second line of the address on the envelope
4. Carbon copies are addressed to the proper people, and the correct name is checked off by a ✓ on the carbon copy before it is put in the envelope
5. A file number, policy number, or department number on the letter if needed
6. Enclosures are put in envelope, and enclosure notations are typed on the letters
7. Special notations, such as CONFIDENTIAL, SPECIAL DELIVER, etc., are on the envelope
8. All PERSONAL and CONFIDENTIAL mail is sealed
9. Labels have been typed for bulky mail being sent separately

VIII. Presorting mail

- A. Before depositing mail, separate it by the following:
  1. Local
  2. Out-of-town
  3. Precanceled
  4. Metered
- B. Presorting is required to help speed handling mail at the post office

IX. Cutting mail costs

- A. Keeps current address lists
- B. Weigh the mail to avoid wasted postage or mail delayed because it does not have enough postage

C. Get current postal rate charts

D. Use the special delivery service only if necessary

E. Except for rush items, combine all mail to the same person into one mailing each day

F. For reply-requested mail, use business reply envelopes. This saves because postage is paid only on the envelopes returned

G. Use SPECIAL HANDLING rather than SPECIAL DELIVERY for packages except in emergency

X. Suggestions for speeding mail

A. Use ZIP code

B. Deposit mail as early as possible

C. Arrange letters so that all addresses face the same way

D. Bundle long envelopes and short envelopes separately

E. Separate SPECIAL DELIVERY letters from regular mail

F. Avoid mixing first-class and third-class mail

G. Separate metered mail from stamped mail

XI. Volume mailings

A. Mailing list--Lists kept by a firm of their customers, subscribers, clients, etc.

1. A firm may use mailing lists for different reasons, such as advertising a new product or announcing a new policy

2. Special mailing lists can be purchased

B. Mailing lists on file cards--Names and addresses of a mailing list kept on 3" x 5" cards, usually placed in alphabetical order and grouped under various classifications. The cards also may be filed by subject.

C. Up-to-date mailing lists--Include additions, deletions, and corrections needed to keep a mailing list current

  1. The post office will help in keeping an up-to-date mailing list

  2. The post office will also supply ZIP Codes or a mailing list for a small charge

D. Metal plates or stencil plates--Used when a mailing list has more than 1,000 names. High-speed machines, such as Elliot Addressing Machine and the Addressograph, are available for processing large volumes of mail

XII. Classes of mail

A. First-class mail--Includes written and typewritten matter such as letters, carbon copies, postal cards, and private mailing cards, as well as material sealed against postal inspection

  1. The rate for letters and first-class packages weighing 12 ounces or less is based on weight by the ounce or fraction of an ounce

  2. First-class items over 12 ounces are considered priority mail. This mail travels by air unless it is a local or area delivery

B. Preferred or priority mail

  1. As of January 1, 1976, the airmail class of mail was replaced by preferred class

  2. Both first-class and preferred class travel by air

  3. Preferred class guarantees overnight delivery within 300 miles

C. Second-class mail

  1. Includes newspapers, magazines, and other periodicals

  2. Rates change with the amount and size of the mailing

D. Third-class mail

  1. Includes individual and bulk mailing of printed circulars, books, catalogs, merchandise, and other printed matter weighing less than 16 ounces

  2. Is mailed unsealed for easy inspection by postal authorities

  3. Is used mostly by non-profit organizations to mail bulk mail at a reduced rate

E. Fourth-class mail (Parcel Post)

  1. Includes merchandise and printed matter weighing 16 ounces or more

  2. Rates are based on the zone to which the mail is going. (The United States is divided into eight zones for fourth-class mail delivery.)

  3. If a message is put in the package, the package is stamped Letter Enclosed and first-class postage for the message (or letter) is required

  4. Messages describing the contents of the package (such as a sales slip or an invoice) are allowed inside the package at no extra charge

F. International mail

  1. Mail addressed to locations outside continental United States or its territories or its possessions

  2. Since rates for international mail are high and weight limits are strict, all correspondence should be written or typed on light-weight stationary

XIII. Special mailing services--Used to ensure safe delivery of mail

A. Special delivery--Used by any class of mail

  1. Separated from regular mail

  2. Usually delivered by messenger to addressee as soon as it is received at the post office in the city or town addressed

3. Sent the same as first-class but usually is delivered quicker

B. Sending valuables

1. By insured mail

    a. Insurance available up to $200 for third-class, fourth-class, and air parcel post (priority mail)

    b. Sent as ordinary parcel post

    c. Receipt is given when article is insured for more than $15

2. By registered mail

    a. Safest way to send valuables

    b. Requires full value of merchandise to be shown

    c. Insurance protection up to $10,000 for domestic mail only

    d. Receipt given for the valuables

    e. Return receipt showing when, where, and to whom mail was sent is given

3. COD (Collect-on-Delivery) mail

    a. Used when merchandise has been ordered by addressee

    b. Requires addressee to pay amount due on merchandise plus postage

    c. Has insurance protection against loss or damage

    d. Sets higher amount ot be collected for one mailing at $200

4. Money orders

    a. Sold at all post offices

    b. Provide a way to send money through the mail

    c. Available in amounts to $300

        - d. Will be replaced if lost or stolen
    - 5. International money orders
        - a. Available at all first-class post offices
        - b. Offered in amounts up to $100

XIV. Mailgram

- A. Combines telegraph and postal services
- B. Western Union installs telegram-receiving equipment in some local post offices
- C. Postal employee receives the message (up to 100 words) from late afternoon through the night
- D. The message is mailed in a window envelope for guaranteed delivery in the first delivery the following morning

XV. Obtaining proof of mailing and delivery

- A. Certificate of mailing
    - 1. Enough if only proof of mailing is needed
    - 2. Provides no insurance coverage for loss or damage
    - 3. Available at low cost
    - 4. Not recorded by post office
- B. Certified mail
    - 1. Provides mailing receipt and record of delivery at addressee's post office
    - 2. Sender can ask for a return receipt, for proof of delivery, at an additional charge
    - 3. Offers no extra security or payment for loss
- C. Return receipts
    - 1. Show proof of delivery
    - 2. Used with insured mail (more than $15), certified, and registered mail

3. Show the mailed article by number, who signed for it, and the date it was delivered

XVI. Tracing mail

A. Used to find mail that does not reach its destination at the expected time

B. Form available at post office to record information needed for tracing

XVII. Forwarding mail

A. Used when there is a change of address

B. Requires change of address cards telling all correspondents and publishers of the new address

(NOTE: The exact date of the change should be on the form.)

C. Forwards first-class mail for one year

ROUTING SLIP

ROUTING SLIP

FROM: ______________________ **DATE:** ______________________

TO:
1. ______________________
2. ______________________
3. ______________________
4. ______________________
5. ______________________
6. ______________________

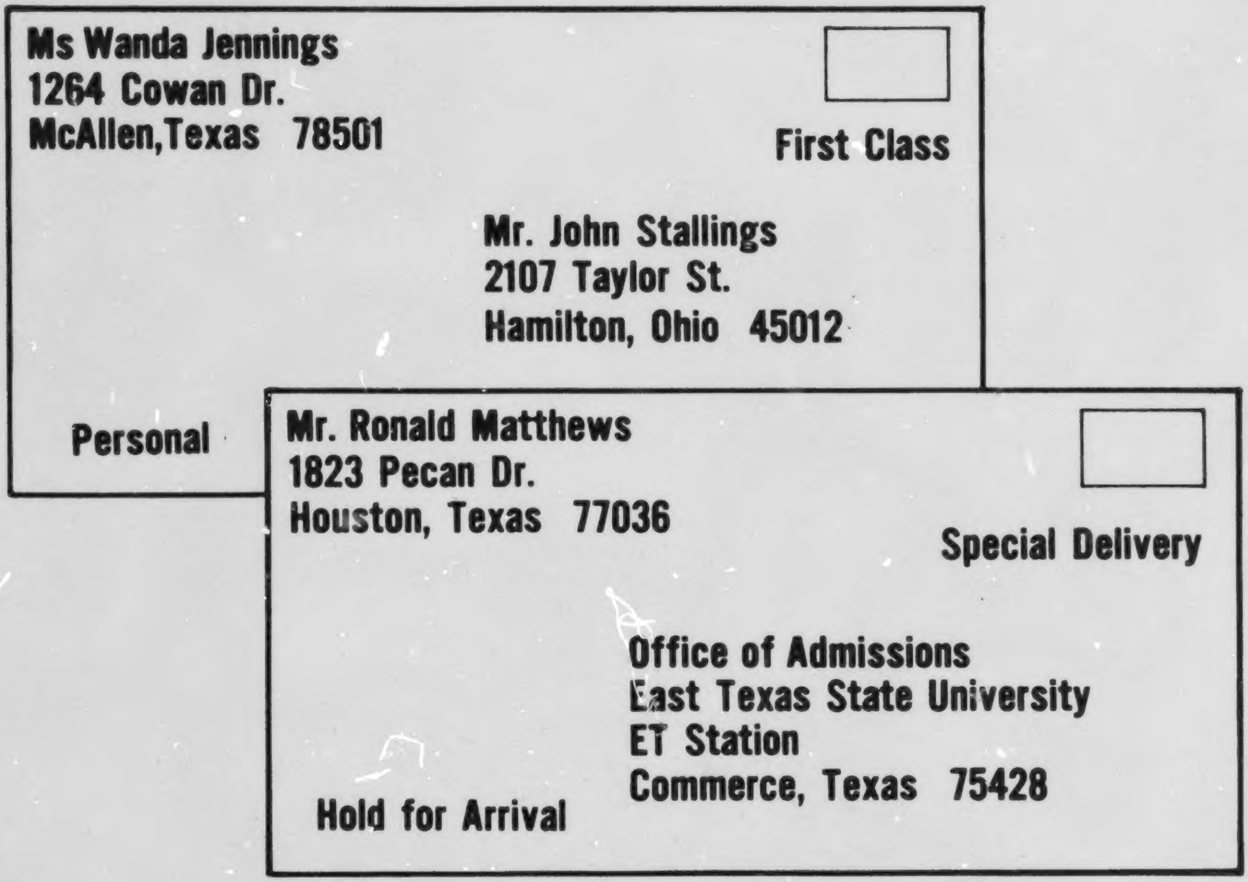
FOR:

☐ Approval
☐ File
☐ Necessary Action
☐ Note and Return
☐ Recommendation

☐ See Me
☐ Signature
☐ Comment
☐ Information

____

CORRECTLY ADDRESSED ENVELOPES



Ms Wanda Jennings
1264 Cowan Dr.
McAllen, Texas 78501

First Class

Mr. John Stallings
2107 Taylor St.
Hamilton, Ohio 45012

Personal

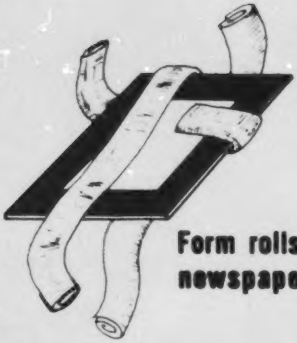
Mr. Ronald Matthews
1823 Pecan Dr.
Houston, Texas 77036

Special Delivery

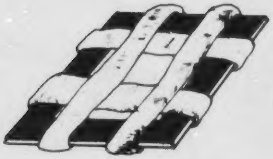
Office of Admissions
East Texas State University
ET Station
Commerce, Texas 75428

Hold for Arrival

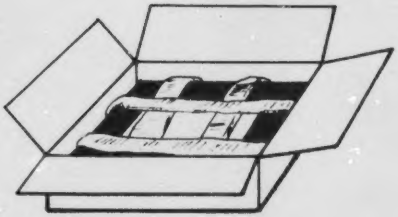
PACKING ITEMS



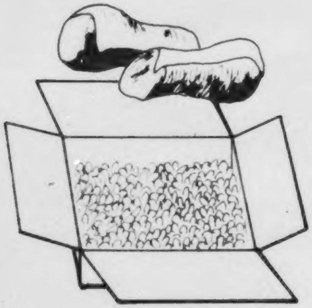
Form rolls from newspapers



Wrap rolls around frame

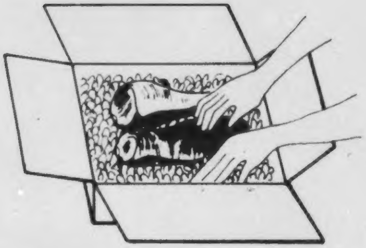


Pack securely in carton



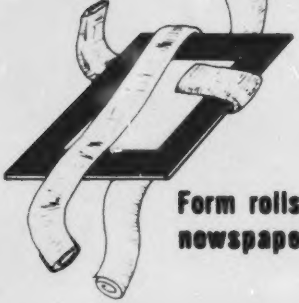
Pack cushioning material in bottom of carton

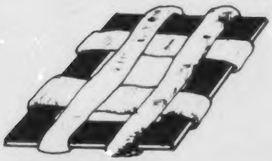
Wrap each item separately

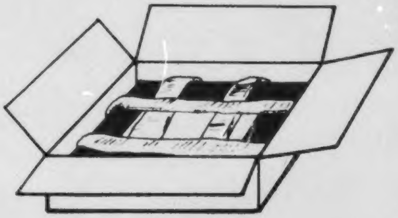


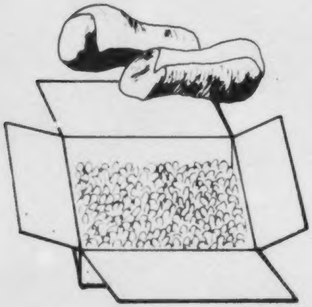
Pack wrapped items in center of carton and pack material around and over

PACKING ITEMS

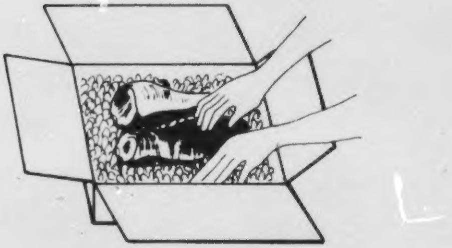

Form rolls from newspapers


Wrap rolls around frame

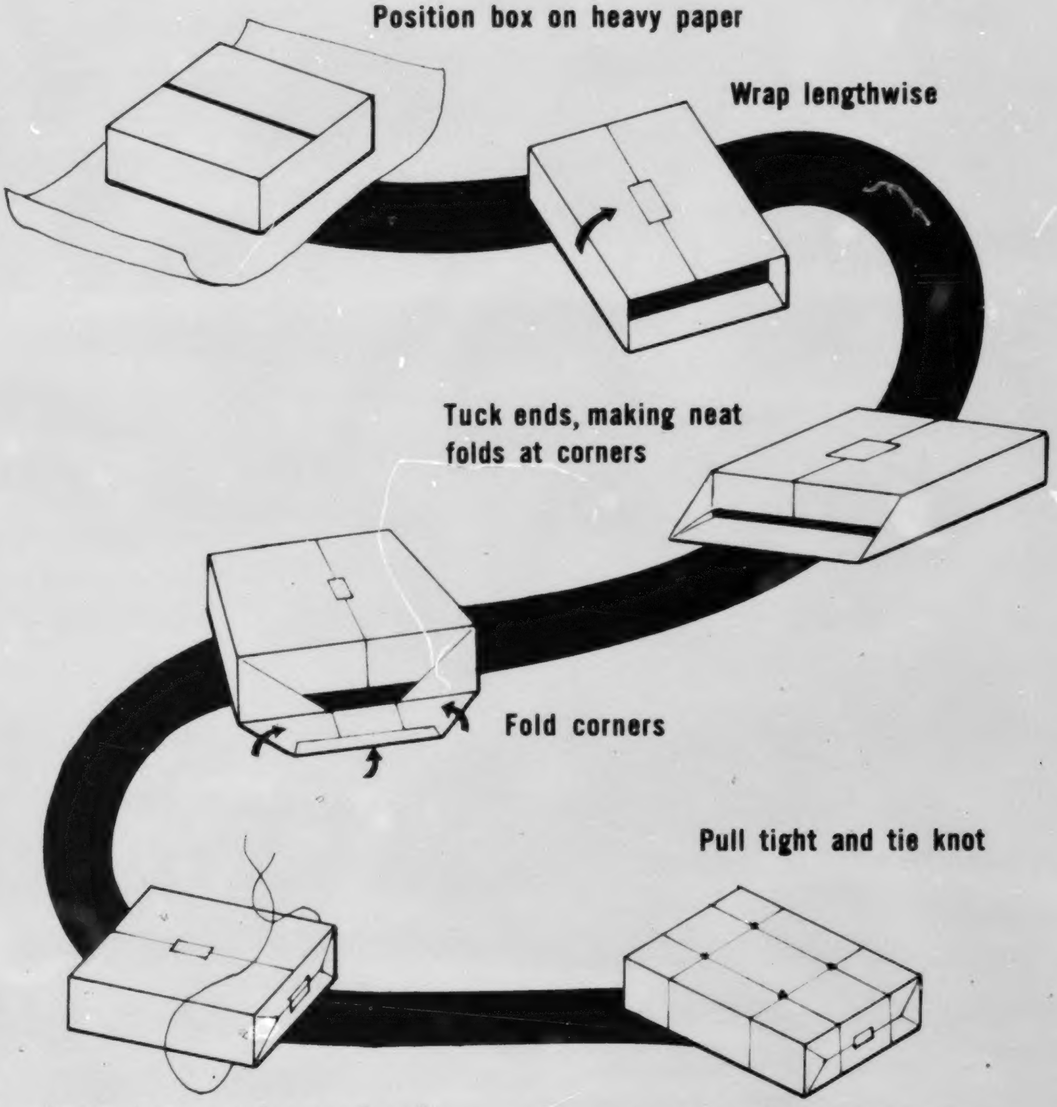

Pack securely in carton


Pack cushioning material in bottom of carton

Wrap each item separately


Pack wrapped items in center of carton and pack material around and over

WRAPPING ITEMS



Position box on heavy paper

Wrap lengthwise

Tuck ends, making neat folds at corners

Fold corners

Pull tight and tie knot

Loop strong cord around end of parcel; then lengthwise

Repeat looping cord at each intersection and tie knot

STATE ABBREVIATIONS

Alabama	AL	Montana	MT
Alaska	AK	Nebraska	NE
Arizona	AZ	Nevada	NV
Arkansas	AR	New Hampshire	NH
California	CA	New Jersey	NJ
Canal Zone	CZ	New Mexico	NM
Colorado	CO	New York	NY
Connecticut	CT	North Carolina	NC
Delaware	DE	North Dakota	ND
District of Columbia	DC	Ohio	OH
Florida	FL	Oklahoma	OK
Georgia	GA	Oregon	OR
Hawaii	HI	Pennsylvania	PA
Idaho	ID	Puerto Rico	PR
Illinois	IL	Rhode Island	RI
Indiana	IN	South Carolina	SC
Iowa	IA	South Dakota	SD
Kansas	KS	Tennessee	TN
Kentucky	KY	Texas	TX
Louisiana	LA	Utah	UT
Maine	ME	Vermont	VT
Maryland	MD	Virginia	VA
Massachusetts	MA	Virgin Islands	VI
Michigan	MI	Washington	WA
Minnesota	MN	West Virginia	WV
Mississippi	MS	Wisconsin	WI
Missouri	MO	Wyoming	WY

UNIT XVII

HANDLING OUTGOING MAIL

ASSIGNMENT SHEET #1--MATERIALS USED IN PACKING

Directions: Find as many packing materials as you can. Bring them to class along with a box, tape, string, and labels. Show the class how you would use the materials.

UNIT XVII

HANDLING OUTGOING MAIL

ASSIGNMENT SHEET #2--PREPARING PACKAGES FOR MAILING

Directions: Listed below are several free pamphlets available from the post office. Choose one and ask for it from the post office. Talk about the pamphlet to your classmates. Prepare samples to help you in your talk.

1. "What Mailers Should Do to Get the Best Service" (No. 153)
2. "Domestic Postage Rates, Fees, Information" (Notice 59)
3. "International Postage Rates and Fees" (No. 51)
4. "How to Prepare Second and Third-Class Mailings" (No. 21)
5. "How to Address Mail" (No. 28)
6. "How to Pack and Wrap Parcels for Mailing" (No. 2)
7. "Refunds of Postage and Special Service Fees" (No. 5)
8. "Express Mail Service" (No. 163)
9. "Zip Code -- Abbreviations for Use with ZIP Code" (No. 59)

UNIT XVII

HANDLING OUTGOING MAIL

ASSIGNMENT SHEET #3--USING ZIP CODES

Directions: Using a national ZIP Code directory, write the complete mailing addresses for the following individuals. Use your own address as the return address on the envelope form.

1. Mary Jones, 4306 Willowbrook, San Antonio, Texas
2. John Sullivan, 525 N. Lawrence, Gary, Indiana
3. Karen Thompson, 6100 Halsted Avenue, Chicago, Illinois
4. Jim Zimmerman, 3106 Regal Row, Dallas, Texas
5. Tammy Carpenter, 6147 Bell Street, Amarillo, Texas
6. Sam McPhearson, 1010 Chimney Rock, Houston, Texas
7. Bob Lundal, 815 Huntington, Mt. Clemens, Michigan

UNIT XVII

HANDLING OUTGOING MAIL

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

Evaluated to the satisfaction of the instructor

Assignment Sheet #2

Evaluated to the satisfaction of the instructor

Assignment Sheet #3

Evaluated to the satisfaction of the instructor

UNIT XVII

HANDLING OUTGOING MAIL

JOB SHEET #1--TYPING ENVELOPES USING STATE ABBREVIATIONS AND ZIP CODES

I. Tools and equipment needed:

A. Typewriter

B. National ZIP Code Directory

C. Ten #10 envelopes

D. Five #6-3/4 envelopes

II. Procedures:

A. Type the following names, addresses, and notations on #10 envelopes. Determine the correct abbreviations and ZIP Code numbers by using the ZIP Code Directory. Use your own name and return address.

1. Mrs. Lola Simpson, 2631 Wilmont, Quinebaug, Connecticut

2. Jack Williams, 6231 Lauri Woods Lane, Decatur, Georgia

3. Harold Stacy, 2621 Ponce De Leon Road, Miami, Florida, Personal

4. Miss Kathy Kaiser, 1616 Firewood Drive, Fort Wayne, Indiana

5. Ruby Wayburn Dress Shop, 8622 Parkmont Boulevard, Baton Rouge, Louisiana.

6. Creighton Medical School, 639 N. 27th, Omaha, Nebraska.

7. Joyce Upton, #162 Carlisle Apartments, 150 Moeller, Binghamton, New York, Hold for arrival

8. A. C. Regency, Vice-President, Gaymore Savings and Loan, Beacon Mutual Building, 52 W. Gay, Columbus, Ohio

9. Dr. Raymond Gillis, Baptist Memorial Hospital, 5899 N. W. Grand Boulevard, Oklahoma City, Oklahoma, Special Delivery

10. Alice Tensley, 2625 Watts Street, Cumby, Texas

B. Type the following names, addresses, and notations on #6-3/4 envelopes. Use the correct state abbreviations and ZIP Code number. Use your own name and return address.

1. Mrs. Frances Blake, Beauty Consultant, Armway Cosmetic Company, 9766 Miramar Road, San Diego, California, Special Delivery

2. Dr. Betty Filmore, Psychologist, Behrens Memorial Hospital, 446 Piedmont, Glendale, California, Personal

3. Ralph Mason, #627 Eastgate Apartments, 162 E. Ontario, Chicago, Illinois, Please Forward

4. Ms. Judy Hammond, 626 College Avenue N., Indianapolis, Indiana, Special Delivery

5. Rachel Hernandez, 5063 Lowell Drive, Kansas City, Missouri, Personal

UNIT XVII

HANDLING OUTGOING MAIL

JOB SHEET #2--FOLDING AND INSERTING LETTERS

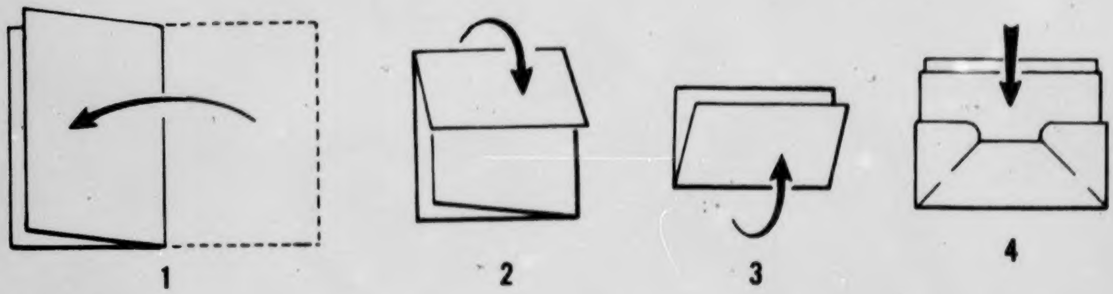
I. Tools and equipment needed:

- A. 3 sheets of regular letter size paper (8½" x 11")
- B. 3 envelopes
  - 1. 6-3/4" or 6-1/4"
  - 2. 10"
  - 3. 10" window envelope

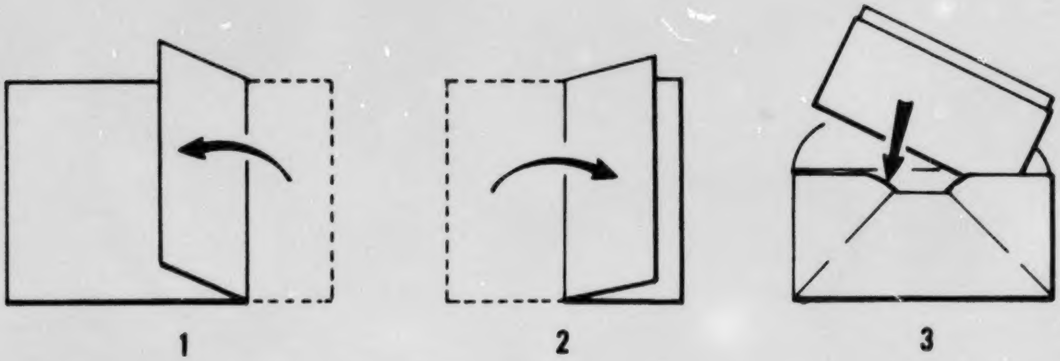
II. Procedures:

Following the instructions listed below, fold one sheet of paper for each size envelope.

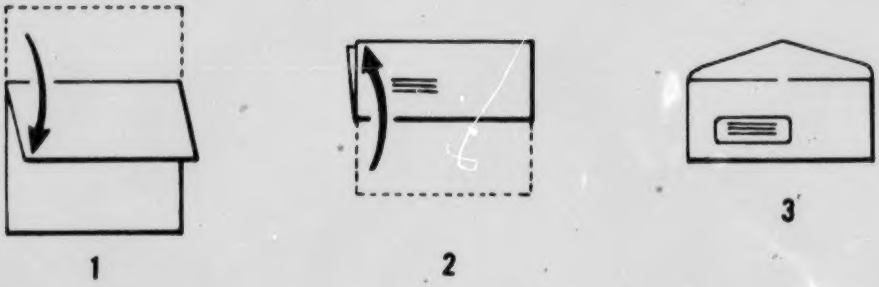
- A. Procedure for folding and inserting letters into small (6-3/4" and 6-1/4") envelopes



B. Procedure for folding and inserting letters into large envelopes



C. Procedure for folding and inserting letters into window envelopes



UNIT XVII

HANDLING OUTGOING MAIL

ANSWERS TO JOB SHEETS

Job Sheet #1

A. 1. CT 06262
   2. GA 30034
   3. FL 33143
   4. IN 46815
   5. LA 70816
   6. NE 68131
   7. NY 13904
   8. OH 43215
   9. OK 73112
   10. TX 75433

B. 1. CA 92126
   2. CA 91206
   3. IL 60611
   4. IN 46202
   5. MO 64129

Job Sheet #2

Evaluated to the satisfaction of the instructor

UNIT XVII

HANDLING OUTGOING MAIL

UNIT TEST

1. Define the following terms
   a. Preparing outgoing mail

   b. Mail inserting machine

   c. Folding machine

   d. Postage meter

   e. Addressing machine

   f. Postage scale

   g. OCR

2. Place a "✓" beside those statements that are true concerning typing envelopes, cards, and mailing labels

____ a. Mailing addresses must be typed two lines above horizontal center of the card or letter

____ b. Addresses may be indented and double spaced according to the number of lines the address contains

____ c. The city, state and ZIP Code must be typed on the bottom line of the mailing address

____ d. There should be at least four spaces left between the state and ZIP Code number

____ e. If a return address is not printed on the envelope, it should be typed in the upper left-hand corner

____ f. Any on-arrival directions, such as Personal or Confidential, should be typed seven lines below the return address

____ g. Any special directions should be typed in all caps

____ h. Any on-arrival directions should be typed in all caps

3. Discuss the differences in procedures used to fold letters in small and large envelopes.

4. List the steps involved in placing stamps on envelopes when a hand-stamp machine is not available

   a.

   b.

   c.

   d.

5. List the advantages of using postage meters

6. Tell how several envelopes can be moistened for sealing at one time

7. Place a "✓" beside those statements that are true concerning checking outgoing mail

   ____a. Every letter is signed

   ____b. The name, address, and ZIP Code are typed correctly on the envelope and match the address on the letter

   ____c. If the Attention of ____________ notation is used, it is typed on the seventh line of the address on the envelope

   ____d. A file number, policy number, or department number on the letter if needed

   ____e. Extra carbon copies are addressed to the proper persons and each name is checked off on the carbon copy before the copy is put into its envelope

   ____f. All enclosures are in the envelope and that there are proper enclosure notations typed on the letters

____ g. Special notations, such as SPECIAL DELIVERY, are included in the letter and not on the envelope

____ h. All personal and confidential mail is sent special delivery

____ i. Labels have been typed for bulky mail being sent separately

8. List the four categories used in presorting mail

a.

b.

c.

d.

9. Identify seven suggestions to help cut mail costs

a.

b.

c.

d.

e.

f.

g.

10. Write seven suggestions to speed the handling of mail

a.

b.

c.

d.

e.

f.

g.

11. Discuss in writing the difference between:

    a. Mailing lists

    b. Mailing lists on file cards

    c. Up-to-date mailing lists

    d. Metal or stencil plates

12. Match the terms used in classifying mail with their correct definition by placing the correct letter in the space provided

____ a. Travels by air and overnight delivery is guaranteed within a 200-mile radius

____ b. Used for individual and bulk mailing of printed circulars, books, catalogs, and miscellaneous printed matter weighing less than sixteen ounces

____ c. Includes written and typewritten matter, such as letters, carbon copies, and postal cards

1. First-class mail
2. Preferred or priority mail
3. Second-class mail
4. Third-class mail
5. Fourth-class mail
6. International mail

____ d. Commonly referred to as parcel post to include items weighing 16 ounces or more

____ e. Includes newspapers, magazines, and other periodicals

____ f. Only for mail outside continental United States and its territories

13. Pick the correct answers to the following statements and place the correct number in the space provided

____ a. Special delivery mail includes:

1. All classes of domestic mail
2. Mail which is separated from other mail and delivered by messenger
3. Mail that is handled the same as first-class mail, except that it is delivered more promptly
4. None of the above
5. All of the above

____ b. Insured mail

1. Is available up to $200 for third-class, fourth-class, and air parcel post
2. Is handled as ordinary parcel post, except delivered in a special mail bag
3. Must have a receipt for delivery of goods under $15
4. None of the above
5. All of the above

____ c. Registered mail

1. Safest way to send valuables
2. Requires the full value of the item to be declared when mailed

3. Provides insurance protection up to $10,000 for domestic mail

4. None of the above

5. All of the above

____ d. COD mail means:

1. Collect-on-delivery service. May be used when merchandise has been ordered by a sales-agent

2. First, third, and fourth-class mail may be sent COD, as well as money orders

3. Fees charge for COD do not include transportation costs

4. None of the above

5. All of the above

____ e. Money orders

1. Safe way to send checks through the mail

2. Can be purchased at all post offices

3. Can be replaced if lost or stolen

4. None of the above

5. All of the above

14. Describe in writing the mailgram

15. Explain the differences between

a. Certificate of mailing

b. Certified mail

c. Return receipts

16. Write the procedure in checking on lost mail

17. Explain the use of change of address cards

18. Demonstrate the ability to:

    a. Select and use packaging materials

    b. Prepare packages for mailing

    c. Use ZIP Codes

    d. Type envelopes for mailing

    e. Fold and insert letters in envelopes

    (NOTE: If the above activities have not been completed prior to the test, ask the instructor when they should be completed.)

UNIT XVII

HANDLING OUTGOING MAIL

ANSWERS TO UNIT TEST

1. a. Preparing outgoing mail--addressing envelopes, folding and inserting letters, putting on stamps or using postage meter, sealing envelopes, and presorting mail for handling

   b. Mail inserting machine--Machine which will automatically stuff a large number of envelopes in a short period of time

   c. Folding machine--Machines which can fold up to 18,000 sheets an hour

   d. Postage meter or automatic mailing machine--Machine which can print postage, and postmark and seal an envelope in one operation

   e. Addressing machine--High speed machine which addresses cards or envelopes using either stencil address plates or permanent metal plates

   f. Postage scale--Object used to weigh letters to determine correct postage needed

   g. OCR--Optical Character Reader--Machine which can electronically sort letters and postal cards faster than sorted manually

2. _____ a.

   _____ b.

   ✓ c.

   _____ d.

   ✓ e.

   _____ f.

   ✓ g.

   _____ h.

3. Folding letters to fit small envelopes requires three folds: (1) fold bottom up to 1/2" from the top, (2) fold right third to left, and (3) fold left third to 1/2" from last crease.

   Folding letters to fit large envelopes require two folds: (1) fold slightly less than one third of the letter up toward the top, and (2) fold down the top of the letter to within 1/2" of the bottom fold.

4. a. Stack envelopes face up

   b. Using a strip of stamps, pass each stamp over a stamp moistener

   c. Stamp the top envelope and remove the strip

   d. Set the envelope aside and continue in the same manner

5. Saves time.
   Prevents stamps coming off of envelopes.
   Speeds mail since metered mail is not canceled at the post office
   No stamps are lost or on personal mail.

6. Overlap the envelopes exposing the gummed flaps.
   A moistener is used to run over the flaps, and the envelopes are closed and sealed.

7. ✓ a.

   ✓ b.

   c.

   ✓ d.

   ✓ e.

   ✓ f.

   g.

   h.

   ✓ i.

8. a. Local

   b. Out-of-town

c. Precanceled

d. Metered

9. a. Keep current mail lists

b. Weigh mail to avoid wasted postage or mail delayed by insufficient postage

c. Get current postal rate charts

d. Use special delivery service only if necessary

e. Except for rush items, combine all mail to the same person at the end of the day into one mailing

f. When sending reply-requested mail, use business reply envelopes rather than stamped envelopes

g. Use SPECIAL HANDLING rather than SPECIAL DELIVERY for packages except in emergency cases

10. a. Use a ZIP Code

b. Deposit mail as early in the day as possible

c. Arrange letters so that all addresses face the same way

d. Bundle long and short envelopes separately

e. Separate SPECIAL DELIVERY letters from regular mail

f. Avoid mixing first-class and third-class mail

g. Separate metered mail from stamped mail

11. a. Mailing lists--Kept by a firm for their clients, subscribers, etc.

b. Mailing lists on file cards--Mailing list kept on 3" x 5" cards usually in alphabetical order and grouped under various classifications

c. Up-to-date mailing lists--Mailing list constantly updated with the assistance of the post office

d. Metal plates or stencil plates--Used when a mailing list has over a thousand names

12. 2 a.
4 b.
1 c.
5 d.
3 e.
6 f.

13. 5 a.
5 b.
5 c.
1 d.
5 e.

14. A message is received at a post office through special telegram receiving equipment. Up to 100 words may be sent during the hours of late afternoon and night. The message is then mailed for guaranteed delivery in the first delivery the following morning

15. a. Certificate of mailing--Used when proof of mailing is needed. No insurance coverage is given and no record is kept in the post office.

b. Certified mail--Provides mailing receipt and record of delivery. A return receipt is given to the sender. Proof of delivery can be obtained at an additional charge.

c. Return receipts-- Shows proof of delivery. Available on insured mail, certified, and registered mail. The receipt identifies the mailed article by number, who signed for it, and the date it was delivered.

16. When mail does not reach its place at the expected time, a form is available at the post office to record information needed for tracing.

17. Used to notify correspondents and publishers of an individual's new address. It allows first-class mail to be forwarded for one year.

18. Evaluated to the satisfaction of the instructor

UNIT XVIII

JOB APPLICATION AND INTERVIEW

UNIT OBJECTIVE

After completing this unit of instruction, the student should be able to identify terms, definitions, and procedures involved in job applications and interviews. The student should also prepare a resume, write a letter of application for employment, complete an employment application form, and in role-playing situations demonstrate the ability to call for an interview appointment and participate in an interview. This knowledge will be evidenced through demonstration and by satisfactorily completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student should be able to:

1. Identify terms relating to job application and interview with their correct definitions
2. Distinguish items of information to be included on a resume
3. List the two methods of applying for a job
4. Identify examples of proper dress and grooming for an interview
5. List the nine ways to prepare for an interview
6. Distinguish proper behavior during an interview
7. Identify attitudes an employer looks for during an interview
8. Name the five reasons one may not get a job
9. Demonstrate the ability to:
   a. Write a letter of application for employment
   b. Role-play making an interview appointment by phone
   c. Prepare and write a resume

d. Answer questions an employer may ask during an interview

e. Participate in and evaluate a role-played job interview

f. Complete an employment application form

g. Write a follow-up letter

UNIT XVIII

JOB APPLICATION AND INTERVIEW

SUGGESTED ACTIVITIES

I. Instructor:

   A. Provide objective sheet.

   B. Provide information and assignment sheets.

   C. Discuss objectives.

   D. Discuss information and assignment sheets.

   E. Make transparencies.

   F. Demonstrate procedures outlined in role-playing situations.

   G. Give test and evaluate results.

II. Student:

   A. Read objective sheet.

   B. Study information sheet.

   C. Complete assignment sheets.

   D. Perform procedures involved in role-playing situations.

   E. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheets

   C. Transparency masters

      1. XVIII-TM-1--Appropriate Dress for an Interview-Male

      2. XVIII-TM-2--Appropriate Dress for an Interview-Female

        3. XVIII-TM-3--Methods of Applying for a Job

    D. Assignment sheets

        1. Assignment Sheet #1--Writing a Letter of Application for Employment

        2. Assignment Sheet #2--Making an Appointment by Phone

        3. Assignment Sheet #3--Preparing and Writing a Resume

        4. Assignment Sheet #4--Answering Questions the Employer May Ask

        5. Assignment Sheet #5--Completing an Employment Application Form

        6. Assignment Sheet #6--Participating In and Evaluating the Job Interview

        7. Assignment Sheet #7--Writing a Follow-Up Letter

    E. Test

    F. Answers to test

II. References:

A. Andrews, Margaret E. *The Job You Want*. Dallas: Gregg Division, McGraw-Hill Book Company, 1968, pp. 73-111.

B. Blackledge, Walter L., Ethel H. Blackledge and Helen J. Keily. *The Job You Want--How To Get It.* 2nd ed. Cincinnati: South-Western Publishing Co., 1975.

C. Fries, Albert C., et al. *Applied Secretarial Procedures*. 7th ed. Dallas: Gregg Community College Division, McGraw-Hill Book Company, 1974, pp. 452-477.

D. Kushner, John A. and Helen J. Keily. *How to Find and Apply for a Job*. 3rd ed. Cincinnati, South-Western Publishing Co., 1975.

E. Meehan, James R., William R. Pasewark, and Mary Ellen Oliverio. *Clerical Office Procedures*. 5th ed. Cincinnati: South-Western Publishing Co., 1973, pp. 548-576.

F. Morrison, Phyllis. A Career in the Modern Office, 4-Getting the Right Job. Dallas: Gregg Division, McGraw-Hill Book Company, 1970, pp. 31-120.

G. Russon, Allen R. Personality Development for Business. 4th ed. Cincinnati: South-Western Publishing Co., 1973, pp. 175-216.

H. Wood Merle W. and Margaret A. McKenna. The Receptionist. Dallas: Gregg Division, McGraw-Hill Book Company, 1966.

III. Transparencies:

Hanson, Garth A. and E. Charles Parker. "Personal Development Transparencies" - Cincinnati: South-Western Publishing Co., 1970.

UNIT XVIII

JOB APPLICATION AND INTERVIEW

INFORMATION SHEET - SECTION 1

I. Terms and Definitions

A. Applicant--Person applying for a job

B. Interviewer--person who talks to the applicant

C. Personal data information sheet--A brief summary of important information about the applicant (Also called a resume or vita sheet)

D. Reference--person, usually not a relative, who knows the applicant

E. Marital status--single, married, or divorced

F. Extracurricular activities--hobbies, interests, etc.

G. Fringe benefits--the "extras" provided by an employer, such as paid vacations, sick leave, and insurance protection.

H. Qualifications--what is required of an applicant for a job

I. Vocational preparation--skills gained through school or work experience

II. Writing a Resume

A. Standards

1. Well organized
2. Neatly typed
3. Typed correctly
4. Written in outline form
5. Limited to one page
6. Is honest

B. Information to be included

1. Name, address, phone number
2. Type of employment wanted
3. Small photograph of self--optional
4. Personal information
    a. Age, weight, height
    b. Health
    c. Date of birth
    d. Marital status
    e. Social Security number
5. Educational Information
    a. Name and address of schools attended
    b. Dates you went to each school
    c. Subjects studied
    d. Awards and extracurricular activities
6. Work experience
    a. Name and address of places you have worked
    b. How long you worked at each job
    c. Tell what you did
7. Special skills, such as typing speed, operating duplicators, etc.
8. References--(be sure to ask these persons if you may use their names)

INFORMATION SHEET - SECTION 2

III. Applying for a job

A. By letter

1. Choose a neat letter style
2. Give information clearly
3. Be brief and to the point
4. Write in a positive tone
5. Keep letter neat
6. Make sure letter has no errors
7. Include the following:
    a. How you found out about the job opening
    b. Job for which you are applying
    c. Reason you want the job
    d. Reason why your training fits the job
    e. Resumé available
    f. Personal traits
    g. Request additional information
    h. Address and telephone where you can be reached

B. By telephone

1. Use a positive tone and pleasant voice
2. Ask qualifications for the job
3. Ask for an application
4. Ask for an interview
5. Tell that a resumé is available

IV. Proper Dress and Grooming for an Interview

  A. Body clean and odor free

  B. Freshly shaven

  C. Hair neat, clean, and trimmed

  D. Hands and nails clean and trimmed

  E. Make-up freshly applied

  F. Teeth brushed

  G. Mouthwash used

  H. Clothing clean and pressed

  I. Simple clothing style

  J. Hose free from runs

  K. Socks match clothes

  L. Shoes clean and polished

V. Steps in preparing for an interview

  A. Call or write for an appointment

  B. Know the job that is open

  C. Learn about the company

  D. If possible, find out the name of the interviewer

  E. Review your own personal qualifications

  F. Think through possible questions interviewer may ask, such as:

    1. Why you want to work for this particular company

    2. Why you left a previous job

    3. What courses you enjoyed in school

    4. How you spend your spare time

    5. Your extracurricular activities

   6. Your vocational goals
   7. Your grades in school
   8. How much salary you expect

G. Plan a list of questions you want to know about the company

   1. Is the job permanent?
   2. What chance to advance is there in the company?
   3. What are the fringe benefits?
   4. What kind of salary increases are included?
   5. When will you be told whether or not you were hired?

H. Prepare a card with all the information you will need to fill out an application form.

   1. Include all the dates you may need, such as birth date.
   2. Write the correct spelling of difficult words.
   3. List the names, addresses, and telephone numbers of individuals you will use as personal references.

I. Check how you look before leaving home.

J. Arrive early and again check how you look.

INFORMATION SHEET - SECTION 3

VI. Proper Conduct During an Interview

- A. Meet interviewer with a smile
- B. Call interviewer by name
- C. Introduce yourself
- D. Shake hands with interviewer firmly
- E. Sit down only after asked by the interviewer
- F. Sit up straight in the chair
- G. Let interviewer lead the conversation
- H. Be polite
- I. Avoid interrupting
- J. Keep resumé and examples of work ready
- K. Express your ideas and views clearly
  - 1. Think through answers before speaking
  - 2. Use correct grammar
  - 3. Avoid slang
  - 4. Look at the interviewer
- L. Show interest
- M. Avoid nervous movements such as
  - 1. Smoking or chewing gum
  - 2. Squirming in chair
  - 3. Crossing legs
  - 4. Tapping fingers
- N. Answer questions honestly
- O. Watch for signs the interviewer is ready to end the interview

P. Thank the interviewer for talking to you

Q. Leave promptly

VII. Attitudes Employer Looks for During an Interview

A. Enthusiasm and interest

B. A sense of direction

C. Sincerity

D. Alertness and quickness of mind

E. Honesty and integrity

F. Desire to work

G. Desire to improve oneself

INFORMATION SHEET - SECTION 4

VIII. Reasons a Person May Not Get a Job

A. Poor grooming habits

B. Poor attitude

1. Chip on shoulder
2. Improper outlook toward work
3. Overly emotional
4. Spoke in a negative manner about previous experiences and acquaintances

C. Was late for interview

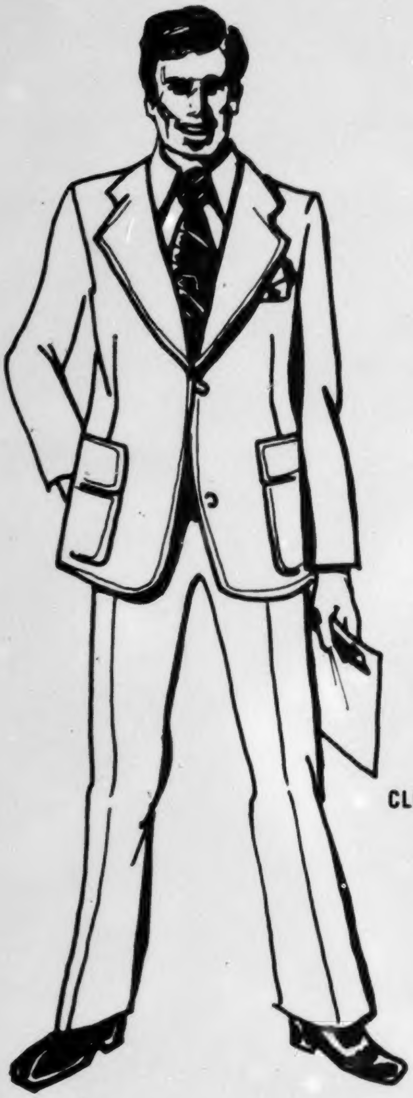
D. Application form was not filled out right

1. Did not follow directions
2. Did not answer all questions
3. Did not write neatly
4. Gave wrong information

E. Poor school grades, records, and many absences and tardies

APPROPRIATE DRESS FOR THE INTERVIEW

Male



HAIR NEAT?

FRIENDLY?

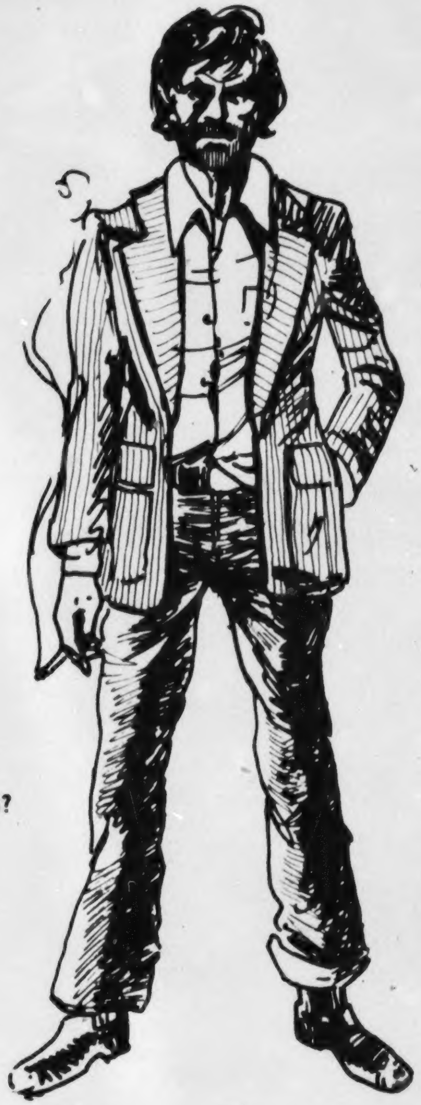
CLEAN SHAVE?

ON TIME?

PEN AND PAPER?

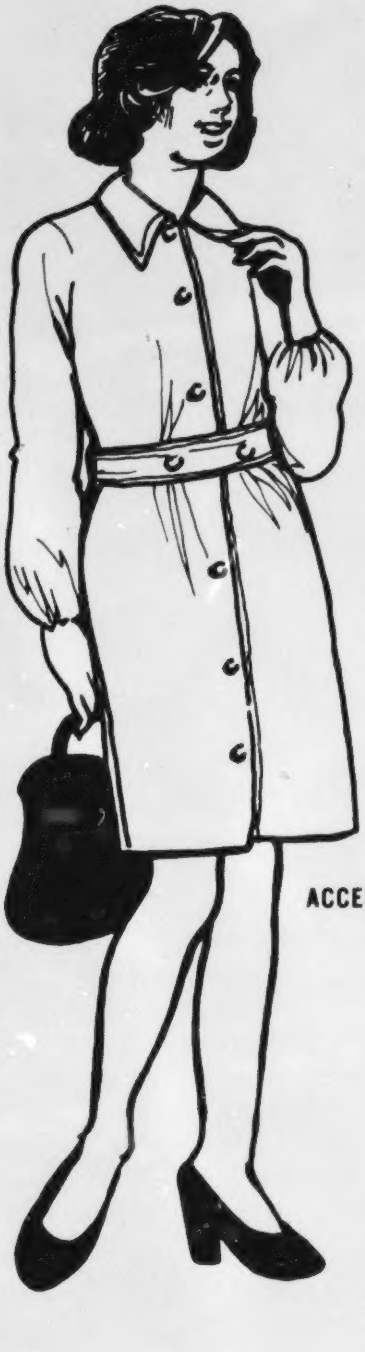
CLEAN AND NEAT CLOTHES?

SHOES SHINED?



APPROPRIATE DRESS FOR THE INTERVIEW

Female

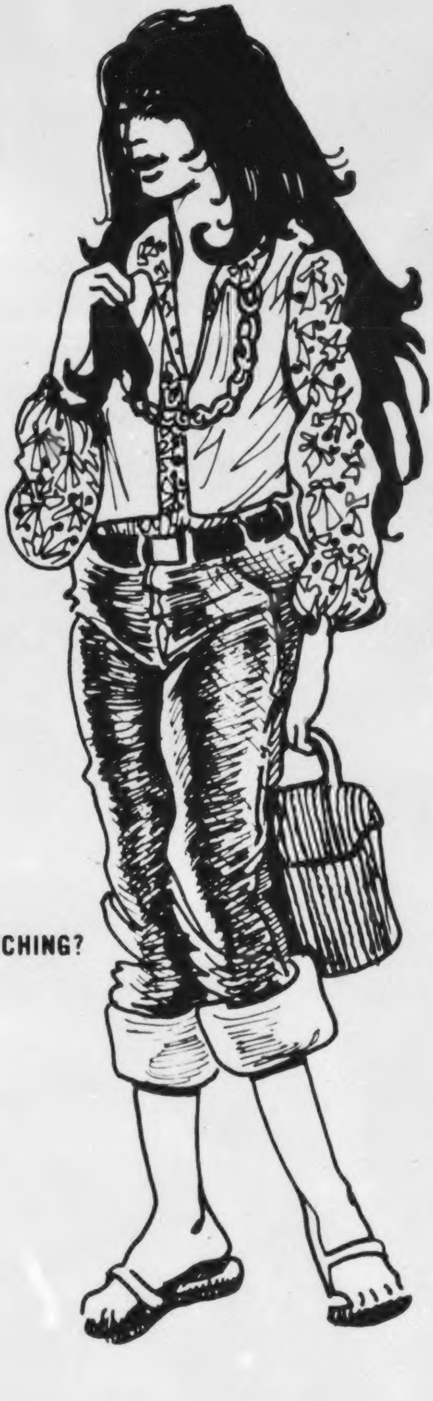


HAIR STYLE SIMPLE?

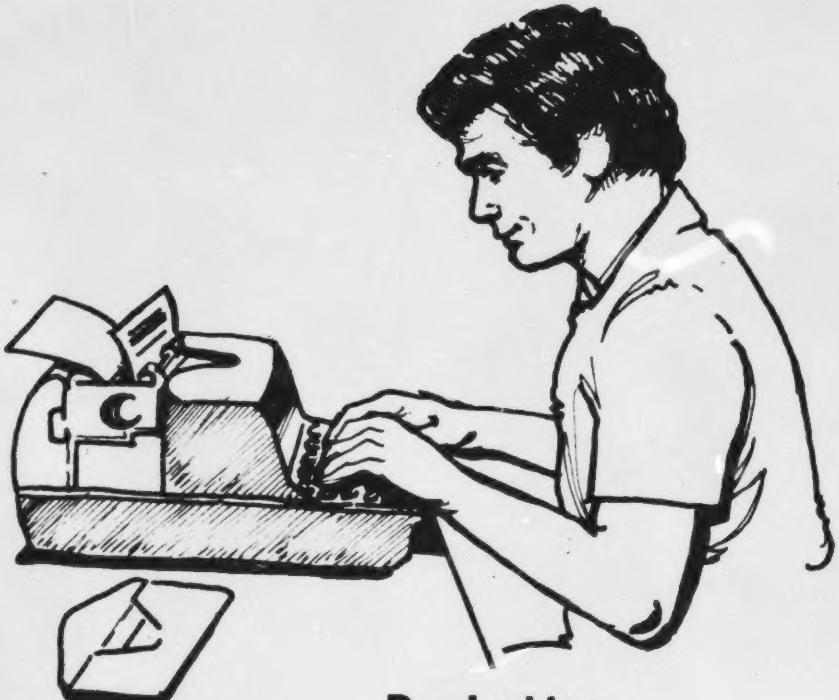
APPROPRIATE MAKEUP?

CONSERVATIVE DRESS?

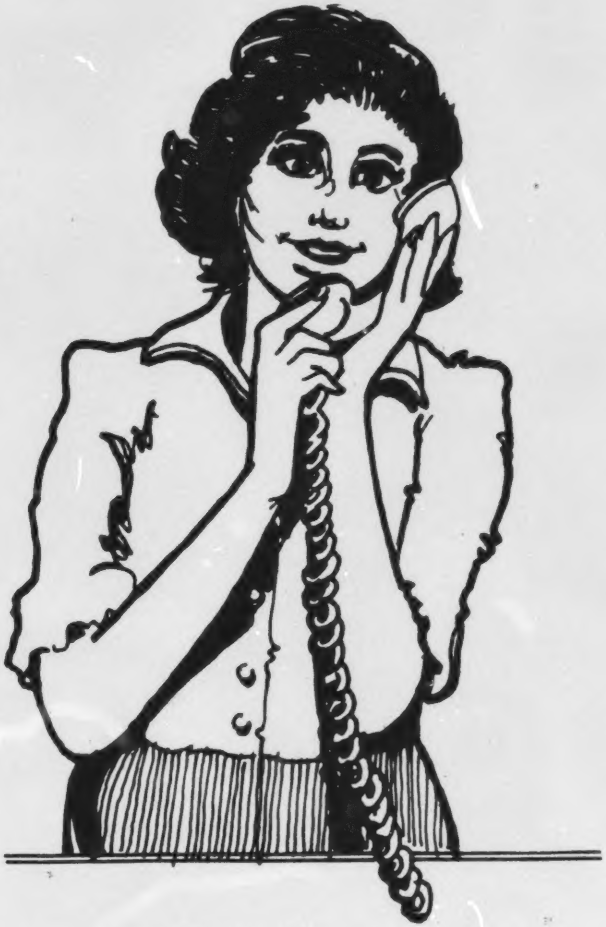
ACCESSORIES - SIMPLE AND MATCHING?



METHODS OF APPLYING FOR A JOB



By Letter



By Telephone

UNIT XVIII

JOB APPLICATION AND INTERVIEW

ASSIGNMENT SHEET #1--WRITING A LETTER OF APPLICATION FOR EMPLOYMENT

Directions: Write a letter of application to a possible employer, using your own choice of letter style. Use the sample letter on the next page as a guide when writing the letter.

SAMPLE LETTER OF APPLICATION

444 W. Washington
Anywhere, Texas 77777
January 15, 1977

Mr. James Zimmerman
Personnel Manager
Titus Corporation
222 Finale Street
Anywhere, Texas 77777

Dear Mr. Zimmerman:

Please accept this letter as my application for the clerical position which your company advertised in the Gazette.

I feel the skills I have learned in my office duplication classes will qualify me for the position. My average typing speed in 60 words per minute, and I have worked with different filing systems. I have had experience operating ten-key adding machines, and spirit, stencil, and fluid duplicators. I also have had training in telephone operation. A more complete description of my qualifications is provided on my enclosed resumé.

Please notify me when I may come in for an interview. I can be reached by telephone at 555-4444 or by mail at 444 W. Washington, Anywhere, Texas 77777.

Sincerely,

Jane Johnson

Enclosure

UNIT XVIII

JOB APPLICATION AND INTERVIEW

ASSIGNMENT SHEET #2--MAKING AN APPOINTMENT BY PHONE

Directions: Using a simulated telephone situation, role-play an applicant interested in a particular job opening with the instructor role-playing the employer's receptionist. After the telephone conversation, complete the checklist below. If you answer "no" to any question, your conversation was not your best and could prevent you from getting the job.

CHECKLIST	YES	NO
1. Prepared before calling		
2. Did not stutter and stammer to find the right words		
3. Identified self immediately		
4. Immediately gave purpose for calling		
5. Inquired when the interviewer could see you		
6. Courteous and friendly		
7. Thanked the receptionist		
8. Recorded the interview date, hour, and location		

UNIT XVIII

JOB APPLICATION AND INTERVIEW

ASSIGNMENT SHEET #3--PREPARING AND WRITING A RESUME

Directions: Write a resume to include with your letter of application. Select the style of your choice or use the example on the next page as a guide.

SAMPLE VITA
RESUME
PERSONAL DATA SHEET

NAME: Jane Johnson

ADDRESS: 444 W. Washington
Anywhere, Texas 77777

TELEPHONE: 555-4444

EDUCATION: Senior at Blank High School to be graduated in May.

AGE: 17 years

HEALTH: Excellent

WEIGHT: 117 lbs.

MARITAL STATUS: Single

HEIGHT: 5'6"

DATE OF BIRTH: 3-15-77

SUBJECTS STUDIED:

Typing
English
Office Duplication Practices
Mathematics

STUDENT ACTIVITIES:

Vice-President, Vocational Office Opportunities Club of Texas
Member Senior Homecoming Committee

SPECIAL SKILLS:

Type approximately 60 words per minute.
Training in the operation of different methods of filing, ten-key adding machine, printing, calculator, stencil duplicator, fluid duplicator, spirit duplicator, offset press as well as supplementary office machines.

WORK EXPERIENCE:

Clerical work for Summer Amusement Center, during summer vacation of 1976. Performed clerical duties, greeted visitors, and handled incoming and outgoing calls.

REFERENCES:

Mr. Ted Boswell
ODP Instructor
Blank High School
124 W. 4th
Anywhere, Texas 77777

Ms. June Jakely
Director, Summer Amusement Center
456 W. 8th
Anywhere, Texas 77777

UNIT XVIII

JOB APPLICATION AND INTERVIEW

ASSIGNMENT SHEET #4--ANSWERING QUESTIONS THE EMPLOYER MAY ASK

Directions: In a job interview, you will have to "sell" yourself. You must be ready to answer any questions asked in a manner that will leave a favorable impression. Select any 10 questions contained on the next sheet and write the question number and your answers to those questions in the space provided.

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

QUESTIONS FREQUENTLY ASKED DURING THE EMPLOYMENT INTERVIEW

1. What are your future plans?
2. In what school activities have you participated? Which did you enjoy most?
3. What are your hobbies?
4. In what type of positions are you interested?
5. Why do you think you might like to work for our company?
6. What jobs have you held? Why did you leave?
7. What courses did you like best? Least? Why?
8. Why did you choose your particular field of work?
9. How did you spend your vacations while in school?
10. What do you know about our company?
11. Do you feel that you have received a good general training?
12. What qualifications do you have that make you feel you will be successful in your field?
13. What extracurricular offices did you have in school?
14. What are your ideas on salary?
15. How do you feel about your family?
16. How interested are you in sports?
17. Do you prefer any certain location?
18. How much money do you hope to earn at age 30? 35?
19. Why did you decide to go to this particular school?
20. Do you think that your extracurricular activities were worth the time you devoted to them?

21. What do you think helps a person's progress in a good company?

22. Why do you think you would like this type of job.

23. What are your parents' occupations?

24. Do you prefer working with others or alone?

25. What kind of boss do you like?

26. Can you take instructions without feeling upset?

27. Do you live with your parents?

28. How did past employers treat you?

29. What have you learned from past employers?

30. Can you get recommendations from previous employers?

31. What interests you about our product or service?

32. Do you feel you have done the best work you could in your classes?

33. What do you know about opportunities in the field which you were trained?

34. Have you ever had any difficulty in getting along with other students and teachers?

35. How do you get your spending money?

36. Have you saved any money?

37. Do you like routine work?

38. Do you like regular hours?

39. What size city do you prefer?

UNIT XVIII

JOB APPLICATION AND INTERVIEW

ASSIGNMENT SHEET #5--COMPLETING AN EMPLOYMENT APPLICATION FORM

Directions: Complete the application form on the following pages and use the following rules:

1. Read all of the application form before you begin
2. Follow the instructions
3. Write legibly
4. Use ink unless asked not to
5. Provide all facts but be brief
6. Fill in all the blanks
    a. Write "N/A" or "not applicable" for questions that do not pertain
    b. If there is no answer, write "none"
7. Know complete addresses, title, and phone numbers of references and former employees
8. When finished, proofread the form to see if it is correct

SAMPLE
EMPLOYMENT APPLICATION FORM

PERSONAL DATA

Name ________ Soc. Sec. No. ________ Date of Birth ________

Address ________ City ________ State ________

How long at the above address? ________ Phone No. ________

Last Previous Address ________ City ________ State ________

Height ________ Weight ________ Maiden Name ________ Husband/Wife's Name ________

Husband/Wife's Occupation ________ Where employed ________

How long? ________ No. of Dependents ________ Children's Ages ________

Relationship of others ________ Single ________ Married ________

How long have you lived in this state? ________ City ________

Who should be notified in case of emergency? Name ________

Relationship ________ Address ________

City ________ State ________ Phone No. ________

Do you own a car? ________ Do you own a health card? ________

Any felony convictions? If "yes" explain ________

Have you ever been bonded? ________ Have you ever been refused bond? ________

NAME: ________

HIRED: ________

LOCATION: ________

TERM: ________

REASON: ________

REHIRE: ________

HEALTH

What is the present condition of your health? ________

List any illnesses in the past year? ________

Date of last physical ________

Do you have any physical defects? ________ Explain ________

MILITARY SERVICE

Yes ____ No ____ Branch ________ Dates: From ________ To ________

Rating upon discharge ________

Type of Discharge: Honorable ________ Medical ________ Other ________

Are you a member of the National Guard? ________ Reserve ____ Active ____

Is yearly active duty required? ________ How long? ________ When ________

EDUCATION (CIRCLE LAST YEAR COMPLETED)

	NAME	HIGHEST YEAR COMPLETED	FROM	TO	MAJOR SUBJECTS
GRAMMAR SCHOOL		1 2 3 4 5 6 7 8			
HIGH SCHOOL		9 10 11 12			
COLLEGE		1 2 3 4 5 6			
		HOW LONG?			
OTHER		HOW LONG?			

Position Requested____________________ Full Time_______ Part Time_______ Hours______

Second Choice______________________________ Salary Expected_______________________

If selected when would you be available for work?___________________________

You are not required to give any information on this form if such is prohibited by law.

REFERENCES (Do not use relatives or former employers)

Name	Address	Occupation
1.		
2.		

EMPLOYMENT HISTORY (Start with Most Recent Employment)

NAME and ADDRESS	TIME EMPLOYED FROM	TO	POSITION	SALARY START	LEAVING	SUPERVISOR
(1)						
PHONE NO.	REASON FOR LEAVING					
(2)						
PHONE NO.	REASON FOR LEAVING					
(3)						
PHONE NO.	REASON FOR LEAVING					
(4)						
PHONE NO.	REASON FOR LEAVING					

Date______________________ 19____ Signature________________________

DO NOT WRITE BELOW THIS LINE

Interviewed by:_______________________________ Date_________________

Remarks____

Appearance: Attitude: Stability:

UNIT XVIII

JOB APPLICATION AND INTERVIEW

ASSIGNMENT SHEET #6--PARTICIPATING IN AND EVALUATING JOB INTERVIEW

Directions: In a role-playing situation, you will participate in a job interview with your instructor acting as the interviewer. Prepare yourself as you would for an actual job interview. After completing the job interview, evaluate the interview, using the following checklist, and place a "✓" in the appropriate column.

	YES	NO
APPEARANCE		
1. Clothing clean and well pressed?		
2. Clothing simple in style?		
3. Body clean and odor free?		
4. Hair trimmed, clean and combed?		
5. Shoes polished?		
BEHAVIOR		
1. Met interviewer with a smile?		
2. Called the interviewer by name?		
3. Introduced self?		
4. Shook interviewer's hand?		
5. Sat only when asked to do so?		
6. Kept eye contact with interviewer?		
7. Listened carefully to what interviewer said?		
8. Thought questions out before answering?		
9. Spoke well of past employers and associates?		
10. Showed desire to work?		

	YES	NO
11. Was open to new ideas?		
12. Was enthusiastic about school, work and life in general?		
13. Asked questions about the job and the company?		
14. Was prepared to tell how you could help the company?		
15. Was honest in telling your qualifications and experiences?		
16. Did not chew gum, smoke or eat candy?		
17. Answered questions briefly and to the point?		
18. Was on time for the interview?		
19. Thanked the interviewer for his/her time?		
20. Left promptly?		

If you answered "NO" to any of the above questions, your chances for getting the job are reduced.

UNIT XVIII

JOB APPLICATION AND INTERVIEW

ASSIGNMENT SHEET #7--WRITING A FOLLOW-UP LETTER

Directions: Write a follow-up letter thanking the employer for the interview. Select your own format or follow the format of the follow-up letter on the next page. Be sure that the letter is typed neatly without errors and points out your appreciation of the time allowed for the interview. Provide a brief summary of your qualifications and interest in the position; plus your name, address and telephone number.

SAMPLE FOLLOW-UP LETTER

444 W. Washington
Anywhere, Texas 77777
January 22, 1977

Mr. James Zimmerman
Personnel Manager
Titus Corporation
222 Finale Street
Anywhere, Texas 77777

Dear Mr. Zimmerman:

Thank you for the time you spent with me in regard to the clerical position in your company. I feel that working for Titus Corporation would be rewarding, and that I could do the clerical work that the position requires. I hope that I have the opportunity to display my skills.

I will be available for work February 1st. You may call me at my home after 4 p.m. The number is 555-4444.

Sincerely,

Jane Johnson

UNIT XVIII

JOB APPLICATION AND INTERVIEW

UNIT TEST - SECTION 1

1. Match the following terms with their correct definitions.

____applicant

____interviewer

____personal data information sheet

____reference

____marital status

____extracurricular activities

____fringe benefits

____qualifications

____vocational preparation

a. the "extras" provided by an employer

b. single, married, or divorced

c. person, rather than a relative, who can tell information about the applicant

d. person who talks to the applicant

e. person applying for a job

f. what is required by an applicant for a job

g. skills gained through school or work experience

h. paper with information about applicant

i. indicates how an applicant spends leisure time hours

2. Place a "✓" beside items of information to be included on the resumé.

____a. Name, address and phone number

____b. Salary

____c. Type of employment wanted

____d. Work experience

____e. Grades made in school

____f. Subjects studied in school

____g. Parent's occupations

____h. References

UNIT TEST - SECTION 2

3. List the two methods in applying for a job.

   a.

   b.

4. Circle the letter in front of each of the following which are examples of proper dress for an interview.

   a. Blue jeans and T-shirts

   b. White socks with a black suit

   c. Teeth brushed

   d. Mouthwash used

   e. Shoes cleaned and polished

   f. Hands and nails cleaned and trimmed

   g. Hosery with a snag or split seams

   h. Wrinkled shirt

   i. Body clean and odor free

   j. Makeup that was applied the day before

5. List ten ways to prepare for an interview

   a.

   b.

   c.

   d.

   e.

   f.

g.

h.

i.

j.

UNIT TEST -SECTION 3

6. Place an "✓" beside those statements which are proper conduct during an interview.

____a. Never smile during an interview.

____b. Always call the interviewer by first name.

____c. Introduce yourself.

____d. Shake hands with the interviewer softly.

____e. Sit in a chair only after asked by the interviewer.

____f. Sit straight, but comfortable.

____g. Take the role in leading the conversation.

____h. Remain polite during the interview.

____i. Interrupt the interviewer anytime a question enters your mind.

____j. Keep resumé and examples of your work handy.

____k. Express ideas and views clearly.

____l. Show sincerity.

____m. Smoke during the interview if desired.

____n. Answer questions honestly.

____o. Look for signs that the interview is over.

____p. Thank the interviewer for the time and leave promptly.

7. List attitudes employer looks for during an interview.

UNIT TEST - SECTION 4

8. List the five reasons one may not get a job.

   a.

   b.

   c.

   d.

   e.

9. Demonstrate the ability to:

   a. Write a letter of application for employment.

   b. Role-play making an interview appointment by phone.

   c. Prepare and write a resume.

   d. Answer questions an employer may ask during an interview.

   e. Participate in and evaluate a role-playing job interview.

   f. Complete an employment application form.

   g. Write a follow-up letter.

   (Note: If the above activities have not been completed prior to the test, ask the instructor when they should be completed.)

UNIT XVIII

JOB APPLICATION AND INTERVIEW

ANSWERS TO UNIT TEST - SECTION 1

1. f applicant
   d interviewer
   h personal data information sheet
   c reference
   b marital status
   i extracurricular activities
   a fringe benefits
   f qualifications
   g vocational preparation
2. ✓ a.
   b.
   ✓ c.
   ✓ d.
   e.
   ✓ f.
   g.
   ✓ h.

SECTION 2

3. Writing a letter of application
   Applying by telephone
4. a.
   b.
   [✓ c.]

[✓ d.]

[✓ e.]

[✓ f.]

g.

h.

[✓ i.]

j.

5. a. Call or write for an appointment

   b. Know the job

   c. Learn about the company

   d. Find out the name of the interviewer, if possible

   e. Review personal qualifications

   f. Think through possible questions interviewer might ask

   g. Plan a list of questions you want to know about the company

   h. Check personal appearance before leaving house

   i. Arrive early and check personal appearance again

SECTION 3

6. ____a.

   ____b.

   _✓_c.

   ____d.

   _✓_e.

   _✓_f.

   ____g.

   _✓_h.

____i.

____j.

__✓__k.

__✓__l.

____m.

__✓__n.

__✓__o.

__✓__p.

7. a. Enthusiasm and interest
   b. A sense of dedication
   c. Sincerity
   d. Alertness and quickness of mind
   e. Honesty and integrity
   f. Desire to work
   g. Desire to improve oneself

SECTION 4

8. a. Poor grooming habits
   b. Poor personality
   c. Late for interview
   d. Application form filled out wrong
   e. Poor school grades, records and too many absence and lateness

9. Evaluated to the satisfaction of the instructor.